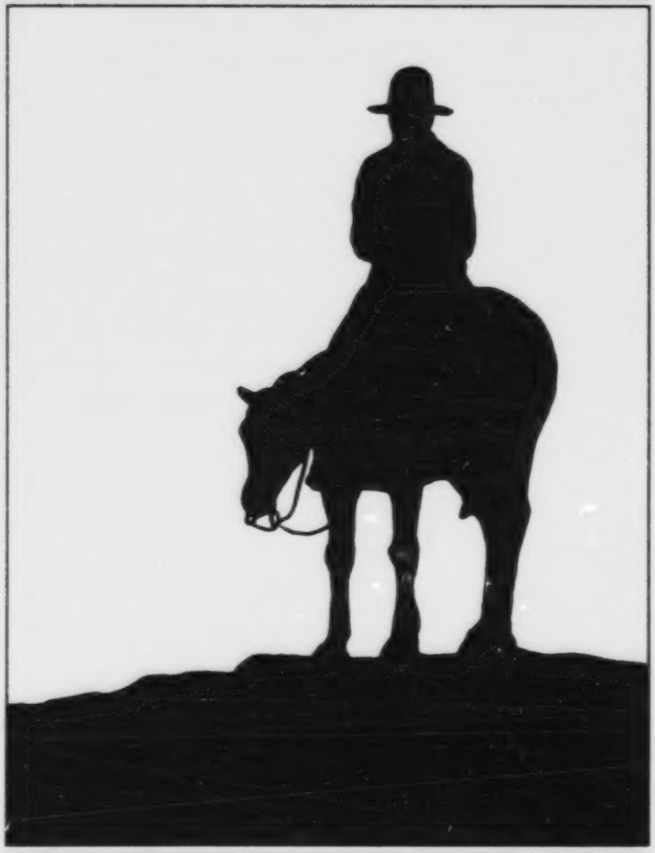
Sessional Paper 624/91
3 Session, 22 Legislature



Foothills
Tourism Destination Resort Plan

Prepared for
Alberta Tourism

FOOTHILLS TOURISM DESTINATION RESORT PLAN

Regional Planning Unit
Planning Division
Alberta Tourism

•

1990

Prepared By

Equus Consulting Group Inc.
#380, First Edmonton Place
10665 Jasper Avenue
Edmonton, Alberta
T5J 3S9

91-05874/

Alberta
TOURISM

Office of the Deputy Minister

6th Floor, CityCentre, 10155 - 102 Street, Edmonton, Alberta, Canada T5J 4L6 403/427-4368 Fax 403/427-2852

To Whom It May Concern:

The Government of Alberta recognizes that tourism is a major and growing economic factor in the Province. Alberta Tourism, in an attempt to capitalize upon this growth, has examined a number of regions in the province which are characterized by important tourism resources.

The following consultant's report identifies and investigates potential tourism development opportunities in the Foothills area (Cochrane/High River/Seebe). This Tourism Destination Resort Plan reviews the impact and relationship of these opportunities to local and regional tourism frameworks. The plan assesses existing tourism resources, potential tourism markets, regional requirements, potential developments, economic impacts and the roles of various participating sectors.

It should be noted that this study was conducted by an independent consultant commissioned by Alberta Tourism, and does not represent government policy nor any commitment to implementation at this time.

If you have any comments regarding the report please forward them to:

Regional Planning Unit
Planning Division
Alberta Tourism
5th Floor, CityCentre
10155 - 102 Street
Edmonton, Alberta
T5J 4L6

Additional copies of the report are available by contacting the above address or by telephoning 427-2501.

Yours sincerely,

Bernard F. Campbell
Deputy Minister

FOOTHILLS TOURISM DESTINATION RESORT PLAN

Table of Contents

Page

EXECUTIVE SUMMARY

CHAPTER 1.0 INTRODUCTION 1
- 1.1 Purpose of Study 1
- 1.2 Tourism Generators 1
- 1.3 Methods 2
- 1.4 How to Use This Study 2

CHAPTER 2.0 DESCRIPTION OF DESTINATION AREA 3
- 2.1 Definition of Study Area 3
- 2.2 Service Centres 3
- 2.3 Subregions Within Study Area 4
- 2.4 Natural Features 5
- 2.5 Cultural Features 6
- 2.6 Recreation Features and Services 7
- 2.7 Access and Travel Patterns 7
- 2.8 Existing Recreational Use 8
- 2.9 Tourism Attitudes, Awareness and Service 11

CHAPTER 3.0 MARKET ANALYSIS 13
- 3.1 Market Size 13
- 3.2 Key Market Segments 15
  - 3.2.1 Household Segments 15
  - 3.2.2 Vacation Segments 16
  - 3.2.3 Special Interest Markets 17
- 3.3 Market Perceptions 17
- 3.4 Population Growth 18
- 3.5 Other Factors 19

CHAPTER 4.0 REGIONAL REQUIREMENTS FOR TOURISM GROWTH 21
- 4.1 Tourism Attractions 21
- 4.2 Tourism Services 22
- 4.3 Tourism Infrastructure 23
- 4.4 Tourism Marketing and Promotion 23
- 4.5 Tourism Attitudes, Awareness and Hospitality 24

CHAPTER 5.0 ROLES OF PARTICIPATING SECTORS 25
5.1 Private Sector 25
5.2 Provincial Government 26
5.3 Not-For-Profit Sector 27
5.4 Local Government Sector 27

CHAPTER 6.0 TOURISM INITIATIVES BY INDIAN TRIBES 29
6.1 Background 29
6.2 The Stoney Tribe 29
6.3 The T'suu T'ina Nation (Sarcee) 30
6.4 Approach and Philosophy 31
6.5 Barriers to Indian Bands Tourism Initiatives 31
6.6 Observations 32

CHAPTER 7.0 MAJOR TOURISM GENERATORS 33
7.1 Alberta Ranch National Historic Site (Bar-U) 34
7.2 Hell's Half Acre Interpretive Centre 36
7.3 Native Interpretive Centre 39
7.4 Western Heritage Centre 41

CHAPTER 8.0 PROPOSED REGIONAL SERVICES & ATTRACTIONS 45
8.1 Maximum View Guest Ranch 45
8.2 Wintergreen 46
8.3 Okotoks Erratic 46
8.4 Bow Valley South Recreation Vehicle Park 47
8.5 Golf Courses 47
8.6 Cochrane Ranche Provincial Historic Site 47
8.7 Kananaskis Guest Ranch Golf Resort 48
8.8 Four Seasons Recreational Vehicle Park 48

CHAPTER 9.0 CONCLUSIONS & RECOMMENDATIONS 49
9.1 Tourism Opportunities 49
9.2 Market Trends and Product Positioning 50
9.3 Role of Generators 51
9.4 Investments in Tourism Development 51

BIBLIOGRAPHY

APPENDICES

Appendix 1: *Market Characteristics*
Appendix 2: *Regional Services and Events*
Appendix 3: *Community and Personal Contacts*
Appendix 4: *Community Tourism Action Plan Priorities*
Appendix 5: *Inventory of Attractions and Events*

FIGURES

Inserted Between Pages:

(1) Existing Tourism Patterns and Service Centres 4/5
(2) Tourism Services 10/11
(3) Market Region 14/15
(4) Potential Tourism Developments 34/35
(5) Bar-U Ranch 34/35
(6) Hell's Half Acre Interpretive Centre 38/39
(7) Western Heritage Centre 42/43
(8) Maximum View Ranch 46/47
(9) Okotoks Big Rock 46/47

TABLES

Page

E-1: Regional Impacts - Maximum View Guest Ranch vi
E-2: Regional Impacts - Wintergreen Ski Facility vi
E-3: Regional Impacts - Okotoks Erratic vi
E-4: Regional Impacts - Bow Valley South Recreational Vehicle Park vi
E-5: Regional Impacts - Typical Golf Course vii
E-6: Potential Tourism Generators in the Foothills Area viii
2.1: Primary Place of Residence for Camping Parties (Bow Valley Provincial Park, 1988) 8
2.2: Comparison of Trip Purpose Between the Two Primary Tourism Zones in Study Area 11
2.3: Comparison of Activities Participated in by Tourists in Zone 1 and Zone 10 11
3.1: Projected Shift in Population Structure by Age Group Category (1989 - 1996) 15
3.2: Estimated Percentage of Vacation Travellers to Study Area 16

EXECUTIVE SUMMARY

This plan was completed in 1990 with the purpose of describing tourism development requirements and strategies in the Foothills area west and southwest of Calgary. The plan assessed potential tourism generators in the area, and also described opportunities and barriers affecting tourism development.

Alberta Tourism defines a tourism generator as: "A provincial/regional tourism generator is a resource (facility, attraction, activity, or event) which has distinct (tourism) market appeal and is capable of producing wealth (revenue) for the Province of Alberta on a sustained basis."

Generators provide a stimulus to trip planning and initiation, and create expenditures in the region over and above on-site visitor expenditures. Generators work best when they "anchor" a tourism image or grouping of services and attractions.

1.0 Potential Investments in Tourism Development

The development of a tourism economy in the Foothills area is feasible and desirable, but it will not be stimulated by any one investment. Instead, there is a need to create focus and co-ordination of tourism investments to create benefits and continued growth. It will be important that all sectors participate and co-ordinate their efforts to create success (refer to Chapter 5). The most important improvements are listed below:

1. Development of a theme, market positioning, and an image that will be consistently portrayed to visitors. This image must be obvious to tourists and readily accessible to them. The historical western "ranch" theme is already well initiated in some locales and would provide a successful basis for tourism development.

2. Development of scenic routes along Highways 1A and 22, including thematic signing and interpretive pull-outs.

3. Development of a major generator and recreation services. A first class interpretive centre would be an appropriate attraction to induce visitors to stop within the study area. Services that emphasize outdoor recreation and adventure opportunities (such as golf

courses, guest ranches, ski hills, trail use areas, and river adventure areas) have proven their ability to attract new visitors to the area. Conformation to the western ranch theme will increase the attraction potential.

4. Development of specialized food and retail services adjacent to major services and attractions.

5. Development of themed townscapes offering attractive "main street" presentations to visitors.

6. Development of themed rural accommodation opportunities (eg. bed and breakfast, country lodge or guest ranch types). The accommodation industry will have to offer "niche" appeal; generic motel investments are unlikely to pay off in this area.

Tourism developments in this area should be undertaken with specific focus upon specific markets in mind and should be developed incrementally, as demand increases. This will minimize the risk of investment dollars, and will ensure that facilities grow in concert with market demand. Additional conditions that will be important to creating success include the following:

- Image and promotion of the area must be planned and co-ordinated;
- Tourism generators must be co-ordinated with retail services (and accommodation, if possible) in order to maximize return on investment;
- Existing businesses must be encouraged to make incremental investments and diversify within the existing framework;
- The potential of Indian reserves as tourism development sources must be recognized;
- The importance of the family market and the need for child-oriented facilities must be considered;
- The strength of the bed and breakfast / guest ranch accommodation within this area must be recognized and supported; and
- The potential weakness of this area in the cold weather months must be minimized through the development of integrated indoor / outdoor opportunities, winter "get-away" events, and attractive retail environments and food services.

The tourism potential of this area is significant, but highly dependent upon getting existing visitors to stop and purchase goods and services. Like many near urban areas, this area will have to develop very specific tourism markets and "niche" offerings that appeal to urban residents. The trade-offs regarding increased traffic and activity in this peaceful, rural setting will cause some public conflicts, and these should be resolved through an appropriate linkage between planning and public involvement.

2.0 Description of Study Area

The study area encompasses approximately 10 500 hectares directly west and southwest of the city of Calgary. It includes three relatively distinct subunits: Zone A (the Bow Valley between Calgary and Seebe), Zone B (the foothills southwest of Calgary–Bragg Creek, Turner Valley and Longview), and Zone C (the area between Calgary and Nanton adjacent to Highway 2). Kananaskis Country is not included in this study.

The area is characterized by excellent scenery, an abundance of evident history (especially from the ranching and settlement period), and significant outdoor recreation resources. Its location between the city of Calgary and the Rocky

Mountains has made it attractive primarily as a day-trip or touring area: it attracts thousands of tourists who use it primarily as a scenic route to Calgary or the mountains. The greatest number of visitors travel on the Trans-Canada Highway between Calgary and Banff. This highway functions as an expressway, and does not encourage service stops or exploration.

The area has experienced only limited tourism vacation development. Most of the obvious development is targetted to one of two markets: adventure recreationists, or day-trippers from Calgary. The adventure market is served by guest ranches, bed and breakfast homes, and river adventure tours. The Calgary day trip market is served at Bragg Creek and Cochrane by several specialty retail and food outlets, and by several golf courses and one ski hill in the area

In addition to the services described above, there are some noteworthy tourism attractions. High River has developed a "main street" service area that is attractive for its western theme and for the range and quality of service outlets. The Longview and Black Diamond bars, and the Millarville racetrack are local legends. However, much of the service community is targetted to agricultural and gasfield requirements, and is not attractive to recreational tourists or touring vacationers.

Businesses and communities in the study area have expressed considerable interest in expanding the range of tourism services and attractions in this area. Many appear ready to make tourism investments.

3.0 Strengths and Limitations

The following strengths and weaknesses affect the potential for successful tourism development. They are described not only in this study, but in Community Tourism Action Plans and Zone Marketing Plans as well.

Strengths

- "Classic" ranch country
- Foothills and mountain scenery
- Excellent tourism access (for most parts)
- Rural lifestyle
- Outdoor recreational resources
- Guest ranches
- Proximity to Calgary
- Obvious historical elements throughout
- Unique services and giftshops
- Legendary characters (living and dead)
- Sunny weather
- Spruce Meadows

Weaknesses

- Few major attractions
- Inadequate and inconsistent services
- Lack of overall tourism image
- Lack of distinctive touring routes
- Poor town appearances
- Lack of signing and identification
- Limited tourism awareness and hospitality skills
- Lack of access to historical information / sites
- Lack of specialized services for target markets
- Lack of co-ordination of events and promotion

4.0 Market Analysis

4.1 Geographic Segments

The market for this area is divided into the following geographic segments:

1. Local Market: Approximately 40 000 residents

2. Secondary Market (includes all residents located within a three hour drive, including the local market): Approximately 2 000 000 residents

3. Western Canadian Market (includes all residences located in British Columbia,

Saskatchewan, Manitoba): Approximately 4 500 000 residents

4. North American Market: Primary markets are Ontario, California, Pacific Northwestern States, and the North Central States

5. Offshore Market: Primary markets are Great Britain, Germany, Southeast Asia, and Australia.

4.2 Household Segments

The markets can be subdivided into the household segments, in terms of the household units in residences in the market areas. The following are the most important segments:

1. Families: Adults 20 - 45, living with children

2. Single/Couple: Ages 20 - 55, no children

3. Mature: Over age 55

4.3 Vacation Segments

The following are the major reasons that vacationing tourists enter the study area:

1. Touring Vacation

2. Adventure

3. Enroute

4. Tour Groups

5. Hunters

6. Visiting Friends and Relatives

There are also special interest markets such as native people, industrial groups (agriculture, oil and gas), convention tours and school children.

Overall, there is a substantial total market for tourism services. The key to success will be to target to specific segments and visitor needs. The flow of visitors through this area is not a limitation. However, the stiff competition from Calgary and Banff for visitor nights means that successful tourism services will have to provide targetted offerings.

5.0 Roles of Sectors

There are four sectors that can play a critical role in the development of the tourism industry in the foothills area. The private sector ultimately determines the success of tourism, by its ability to bring revenue in to the region. There are many areas where private entrepreneurs can become involved, including: (1) themed accommodations, (2) tourist-oriented food services, (3) recreation opportunities, (4) retail services, (5) highway and travel services, and (6) tourist attractions.

The provincial government can play a catalytic role by supporting: (1) planning and community involvement, (2) development of attractions, and (3) promotion and marketing.

The not-for-profit sector has already taken the lead in the development of tourism attractions in the area. However, the effectiveness of this sector can be improved through adherence to business principles.

Local government can support tourism through (1) planning and policy, (2) zoning by-laws, (3) community appearance, (4) directional signs, and (5) direct and indirect support for tourism attractions.

6.0 Generators

Four major tourism generators were assessed during this study. They were all based upon the "interpretive centre" concept. None of the major generators described would be feasible as a profitable investment. They all must be looked at as community investments that generate regional benefits well beyond the original cost. All should attempt to achieve operational self-sufficiency, however. The generators are described in the following statements:

Bar-U Ranch

A proposed restoration of one of the earliest large ranches in Alberta. Located on a very picturesque site southwest of Longview, the site will offer interpretation services, restored ranch buildings, trail ride opportunities, picnics, restaurant, and gift shop. The proposed site is immediately adjacent to a working ranch.

Hell's Half Acre

A major interpretive park offering interpretation of the Turner Valley Gas Refinery. The site, located at Turner Valley, was one of the most important gasfield developments in North America, and helped transform the Alberta economy. The proposed development would offer high technology interpretation and transportation, and onsite foodservices. The proposed development includes almost $30 million of development, but only Phase 1 is described in this report.

Native Interpretive Centre

There have been several concepts for a major interpretive centre offering a "living" recreation of plains Indian arts and culture. The one described here would be potentially located on or near the Stoney Indian Reserve near the Trans-Canada Highway.

Western Heritage Centre

A major interpretive centre offering "living" interpretation of the ranching and livestock industry, located near Cochrane on Highways 1A and 22.

The generators are described in Table E-6 which indicates their strengths, weaknesses, costs and benefits. Described for the purposes of this report, all are of comparable scale and cost.

7.0 Regional Services and Attractions

There is currently significant interest in upgrading tourism services in the study area to attract travellers to the region. Several private sector proposals have already advanced to the planning and/or implementation stages. In addition, the Department of Culture and Multiculturalism has expressed interest in upgrading the "Okotoks Erratic", a roadside pull-off with some potential to stop through traffic in the area.

These regional services will provide a significant increase in day and overnight visitation within the area. They will also establish a new standard of services which will create "momentum" in the study area. The benefits of these services are described in the following statements and tables:

Maximum View Guest Ranch

Table E-1

•

MAXIMUM VIEW GUEST RANCH

Regional Impacts

Visitors:	7 000
Temporary Construction Impact ($):	15 953 000
Temporary Construction Impact (jobs):	256
Visitor Expenditure Impact ($):	3 062 500
Visitor Expenditure Impact (jobs):	76

The Maximum View Guest Ranch (near Millarville) is a proposed major development which may include more than 16 rooms and 32 units in a themed lodge/cabin facility. It is aimed at tourists with a high net worth, and will offer the highest level of personal services, catering to adventure- seekers primarily.

Wintergreen Ski Facility

The Wintergreen ski facility (near Bragg Creek) is now adding a 27 hole golf course and recreation complex. This will make it a significant year-round attraction.

Table E-2
•
WINTERGREEN
Regional Impacts

Golfing Rounds:	35 000
Ski Hill Visitors:	100 000
Temporary Construction Impact ($):	3 850 000
Temporary Construction Impact (jobs):	72
Visitor Expenditure Impact ($):	4 725 000*
Visitor Expenditure Impact (jobs):	117

***Includes both ski hill and golf course.*

Okotoks Erratic

The Okotoks Erratic (near Okotoks) is a unique large boulder left behind by glaciers. The Department of Culture and Multiculturalism is contemplating the addition of trails, interpretive signs, and a picnic area.

Table E-3
•
OKOTOKS ERRATIC
Regional Impacts

Visitors:	30 000
Temporary Construction Impact ($):	1 153 000
Temporary Construction Impact (jobs):	9
Visitor Expenditure Impact ($):	630 000
Visitor Expenditure Impact (jobs):	16

Bow Valley South Recreational Vehicle Park

The proposed Bow Valley South Recreational Vehicle Park (near Seebe) will provide a serviced campground facility which will attract traffic from the Trans-Canada Highway. This facility will help stop through traffic for an extra day in the study area.

Table E-4
•
BOW VALLEY SOUTH
RECREATIONAL VEHICLE PARK
Regional Impacts

Overnight Visitors:	13 500
Temporary Construction Impact ($):	2 750 000
Temporary Construction Impact (jobs):	52
Visitor Expenditure Impact ($):	992 000
Visitor Expenditure Impact (jobs):	25

Golf Course Developments

There is significant interest in the development of golf courses in the area. Many of these courses will be private residential clubs. However, a public course would attract significant traffic into the study area (primarily from Calgary).

Table E-5
•
TYPICAL GOLF COURSE
Regional Impacts

Golfing Rounds:	30 000
Temporary Construction Impact ($):	3 850 000
Temporary Construction Impact (jobs):	72
Visitor Expenditure Impact ($):	1 312 500
Visitor Expenditure Impact (jobs):	33

Table E-6: POTENTIAL TOURISM GENERATORS IN THE FOOTHILLS AREA

	BAR-U RANCH	*HELL'S HALF ACRE*	*NATIVE INTERPRETIVE CENTRE*	*WESTERN HERITAGE CENTRE*
• **Strengths**	- Best site of its kind in Alberta - Scenic setting - Adjacent to working ranch - Attractive theme - Paved access nearby - Food services on site	- Unique oil/gas industry site - Valuable educational experience - Interpretive media will be attraction - Significant range of 20th century history at one location - Adjacent to Kananaskis Country - Located near population of 720 000	- High profile, int'l theme - Superb scenery - High traffic location - Food services onsite - Thematic accommodation nearby - Easily tied into tours and touring holidays - Attractive to day and destination tourists - Located near population of 720 000	- Attractive theme - Attractions and services in region related to theme - Accessible site - Large population nearby - Large scenic grounds - Food services/retail goods onsite - Dynamic display - Historical authenticity - Located near population of 720 000
• **Limitations**	- Location - site is 44 km from Highway 22 - No onsite accommodation - Nearest services are limited and 15 km away - Opportunity for day-trip tie-ins are limited - Limited onsite capacity - Operating season limited to 150 days	- Tourism services undeveloped - Theme does not have int'l appeal - No onsite food/accommodation services - Low enroute traffic - Public aversion to gas processing facilities - Does not capitalize on public desire for scenery - Is not a well known landmark outside Calgary area	- Concept not yet supported by native peoples - Off-season draw may be limited - Concept is not yet clearly outlined - Difficult to co-ordinate required level of live presentations - Site not yet acquired	- 12 kms from Trans-Canada Hwy - Lack of existing historic ranch buildings - Close to residential area - Potential conflict with Cochrane Ranche development - Lack of overnight accommodation
• **Visitation**	- Local: 60% - Enroute: 10% - Western Canada: 20% - North America: 7% - Offshore: 3% - Est. total: 60 000	- Local: 78% - Enroute: 8% - Western Canada: 7% - North America: 5% - Offshore: 2% - Est. total: 149 500	- Local markets: 40% - Enroute: 25% - Western Canada: 10% - North America: 15% - Offshore: 10% - Est. total: 247 500	- Local markets: 78% - Enroute: 10% - Western Canada: 5% - North America: 4% - Offshore: 3% - Est. total: 220 000
• **Operating Deficit**	- $420 500 (year 3)	- $205 150 (year 3)	- $1,750 (year 3) *(Surplus)*	- $494 232 (year 3)
• **Temp. Construction Impact**	- $5 109 800/125 jobs	- $7 312 000/179 jobs	- $7 312 000/179 jobs	- $7 312 000/180 jobs
• **Operations Impact**	- $927 850/28 jobs	- $1 719 000/51 jobs	- $2 058 000/61 jobs	- $2 312 000/69 jobs
• **Visitor Spending Impact**	- $1 180 000/7 jobs	- $2 940 000/18 jobs	- $4 901 000/30 jobs	- $3 100 000/19 jobs
• **Potential for Related Tourism Developments**	- Food services/gift store - Guest ranch accommodations - Western theme meals, bars, souvenirs, accommodations - Highway services	- Overnight camping - Bed & breakfast, guest ranch, & motel accommodations - Restaurants - Specialty retail services - Highway services	- Restaurant services - Specialty retail services - Highway services - Accommodation services - Overnight camping	- Restaurants - Specialty retail services - Highway services - Accommodation - Adventure tourism services

Source: Equus Consulting Group

CHAPTER • ONE

INTRODUCTION

1.1 Purpose of Study

The purpose of this destination plan is to describe tourism development requirements and strategies in the Foothills area located west and southwest of Calgary. It addresses this development opportunity in two ways: firstly, through the assessment of potential tourism generators in the area (see Section 1.2), and secondly through the identification of opportunities and barriers affecting tourism development that the provincial government and others can positively influence.

This plan is intended to be used for tourism planning and to support tourism development decision-making by elected officials, the private sector, Community Tourism Action Plan Committees, and non-profit groups. It is one of several commissioned by the Alberta Department of Tourism to identify the potential to stimulate tourism development in the province. The undertaking of this plan does not imply any specific commitments on the part of the Government of Alberta.

1.2 Tourism Generators

Alberta Tourism defines a tourism generator as: "a resource (facility, attraction, activity or event) which has distinct (tourism) market appeal and is capable of producing wealth (revenue) for the Province of Alberta on a sustained basis".

Generators provide a stimulus to trip planning and initiation and create expenditures in the region over and above on-site visitor expenditures. Generators work best when they "anchor" a tourism image, or grouping of services and attractions.

Within this study, tourism generators have been explored as one means of stimulating tourism development. The study assesses four major generators, each of which can play a role in the development of the region. However, it also must be recognized that tourism development can be stimulated in other ways. The description of the four generators in this report does not imply that any or all of these generators is a requisite to tourism development, but it does imply that each would provide a possible means of tourism stimulation.

The area studied in this plan received significant international visitation recently, when the 1988 Winter Olympics were hosted. Over the past few years, the demand by Calgary residents to experience the rural foothills setting had been rising significantly. While the area is relatively underdeveloped as a tourism destination, several recent tourism developments are evident, and the impact of tourism on the local economy is growing at an accelerated rate.

1.3 Methods

The contents of this study are based upon both secondary and primary research. Secondary sources included Community Tourism Action Plans, Zone Marketing Plans, Canadian and provincial tourism data, reviews of previous generator/destination resort studies, and analyses of information about comparable areas or developments. This information was supplemented by interviews with representatives of municipalities, tourism zones, economic development authorities, proposed developments, and operating tourism services (see Appendix 3).

In addition to the secondary research, the data for the study was supplemented with focus groups undertaken to provide a preliminary assessment of market needs and preferences.

1.4 How to Use This Study

The study is divided into an executive summary and nine chapters to facilitate reference use. Each chapter provides a concise overview of the research information, and specific observations intended to help decision analysis. If more detailed research information or data is required, please refer to the appendices at the back of the report. There are several maps included with the report; these are intended to help the reader locate specific sites and visualize proposed developments.

CHAPTER • TWO

DESCRIPTION OF DESTINATION AREA

2.1 Definition of Study Area

This study describes the foothills area to the west and southwest of the city of Calgary (see Figure 1). Encompassing approximately 10 500 hectares, the area includes 25 settlements and a population of 38 517. Highway 2 (south of Calgary) is the eastern boundary while the western boundary is Kananaskis Country. The area extends south along Highway 2 as far as the town of Nanton. The northern boundary is Secondary 567, north of Cochrane. The study area was defined by Alberta Tourism. In consideration of trade area relationships and proposed tourism developments, the study area was later expanded to include the Seebe area in the northwest and Nanton in the southeast.

2.2 Service Centres

There are three categories of service centres: urban satellites, regional service centres, and local service centres. The **urban satellite centres** are closest to Calgary, and are highly influenced by their proximity to the urban environment. Local businesses within these centres see their primary market as suburban residents who commute to Calgary for employment, their secondary market as urban residents who travel out to the area for recreational purposes.

Okotoks is the largest satellite community (6 000 residents). It is located approximately 21 kilometres south of Calgary and has a relatively young population (80 percent under 45 years of age). It has experienced rapid growth during the last five years (five percent growth rate per annum). Cochrane is smaller (4 300), but similar to Okotoks in that it has experienced rapid growth during the last few years and has a substantial portion of its labour force employed in Calgary. Bragg Creek is an unincorporated hamlet located 20 kilometres west of Calgary which also attracts urban day visitors.

High River is a **regional service centre**. This town has developed a role as a regional centre for goods and services, and has been influenced by the potential to serve visitors travelling on Highway 2, and accessing Kananaskis Country. While residents from High River travel to the large urban centres for specialized services, there is a wide range of local services, including some specialized services for tourists. High River is described as being the centre within a significant surrounding regional trading area, identified by the Calgary Regional Planning Commission as a result of a household survey completed in 1986.

The towns of Black Diamond, Turner Valley and Nanton, and the village of Longview are **local service centres**. Their distance from Calgary lessens their dependence on Calgary for employment and services. Though there is a moderate effort to attract tourists to these localities, the major focus remains the servicing of the surrounding local rural communities. Community support for tourism is strongest in the northern portion of the study area.

2.3 Subregions Within Study Area

The study area is not uniform in terms of its existing or potential tourism attributes. Instead, it can be divided into three subregions, or zones, which have significantly different tourism attributes.

Zone A - The Bow Valley Corridor

Zone A extends west from the Calgary city limits along the Bow Valley corridor towards Seebe, and the entrance to the Canmore corridor. It is markedly different from the rest of the study area, because it includes the Trans-Canada Highway which is the most significant tourist route in the province. In addition, the valley includes Cochrane and Highway 1A, which attract a relatively small traffic flow, but a high percentage of recreational traffic ("the scenic route"). The terrain is distinctive: the broad valley of the Bow Valley, flanked to the west and the south by the spectacular Rocky Mountains.

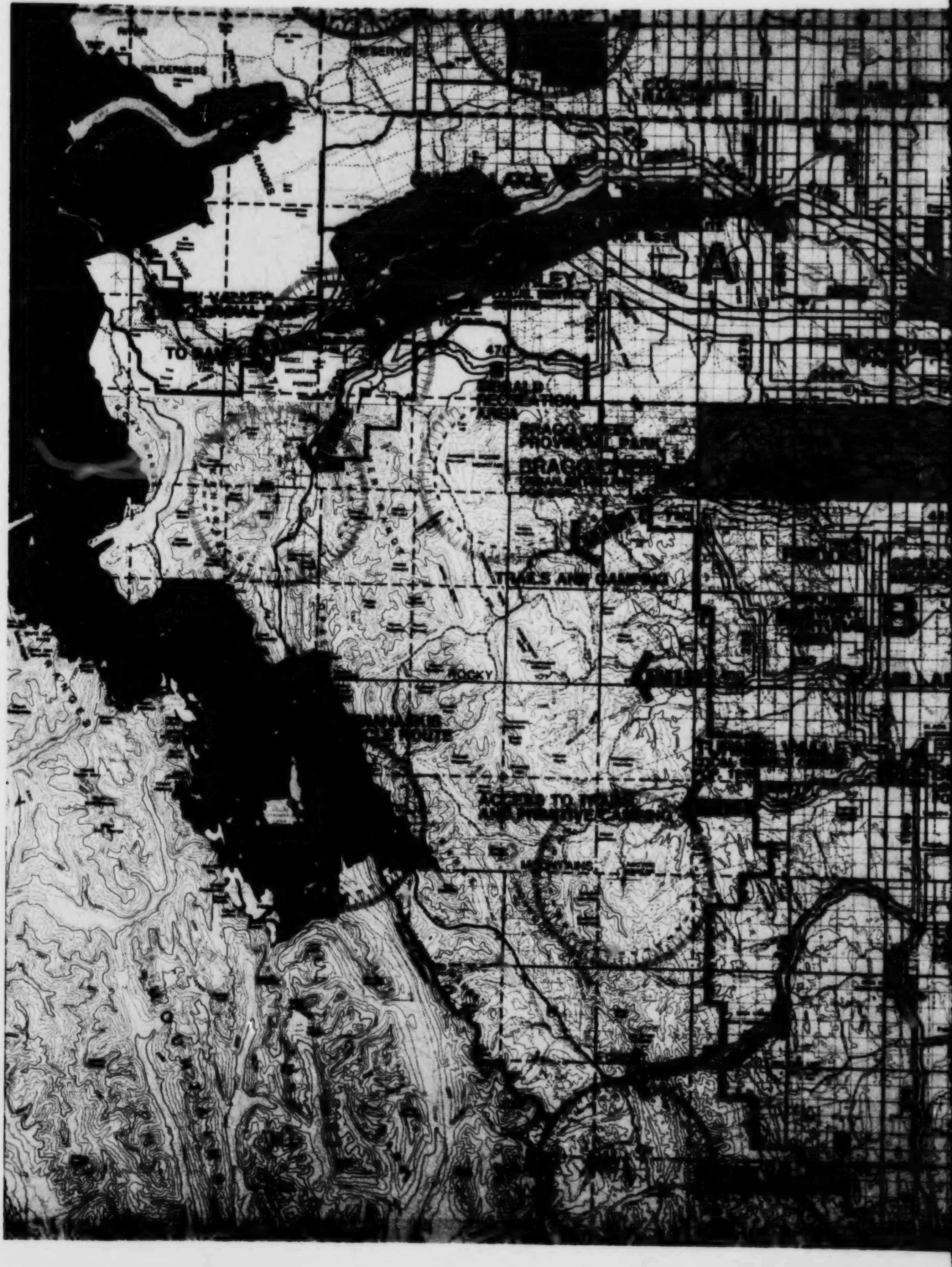
Despite the high tourist traffic, there are relatively few tourist services in this zone. A great deal of the traffic is serviced in Calgary, Banff, and Canmore, which is emerging as a tourism destination. A significant portion of the land in the zone belongs to the Stoney Indian Reserves No. 142, 143 and 144. Including the rural and indigenous populations, Zone A has a total of approximately 11 000 residents. Many of these residents are employed in the city of Calgary.

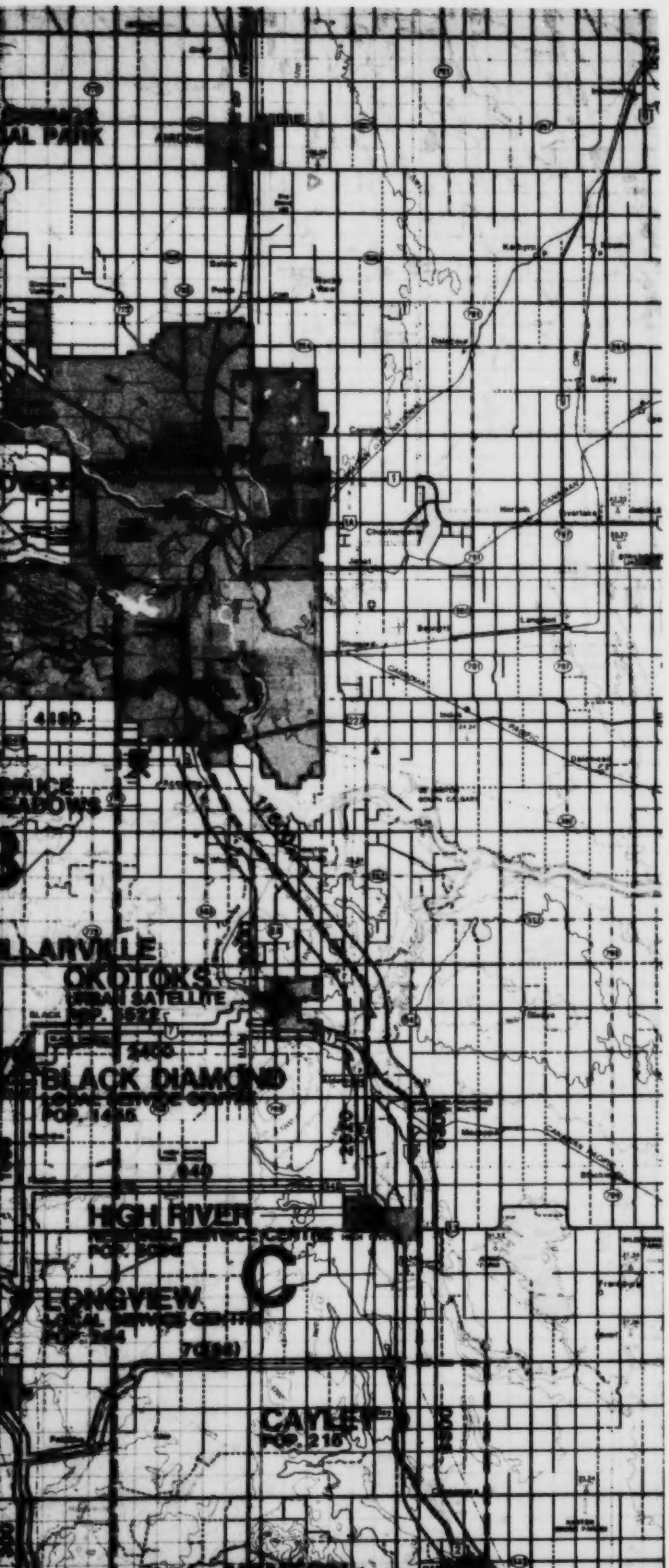
Zone A includes 1 033 camping sites which are concentrated at the western edge of Calgary, and the perimeter of Kananaskis Country. Presently there are two facilities providing 53 units of hotel/motel style accommodation in the zone. Fixed roof accommodation is also located at the edge of Kananaskis Country and includes several lodges that developed around specialized uses like horseback riding and conference attendance, including: Nakoda Lodge, Rafter Six Guest Ranch, and Kananaskis Guest Ranch. Food services are largely limited to these locations, although Chief Chiniki Restaurant provides roadside service at the halfway point. (See Appendix 2.) Both Cochrane and Canmore have a growing number of arts and craft outlets and specialty shops which attract regional visitors.

Zone B - The Foothills

Zone B includes the rolling foothills terrain located southwest of Calgary. The partially forested foothills are intermittently cut by scenic valleys created by drainage from the mountains to the west. Included in this zone are the towns of Black Diamond and Turner Valley, the village of Longview, and the hamlets of Bragg Creek, Priddis and Millarville. There are two reserves: the Sarcee Indian Reserve No. 145 and the Eden Valley Indian Reserve No. 216. With a population of 8 869, Zone B is the least populated zone in the study area.

The tourist services are largely undeveloped. Presently there are three hotel/motels in the area providing 67 fixed roof units and three campgrounds providing 70 serviced


WILDERNESS
RESERVE
RANGES
RANGE
470
RECREATION AREA
BRAGG CREEK PROVINCIAL PARK
TRAILS AND CAMPING
ROCKY
ACCESS TO TRAILS AND PRIMITIVE CAMPING
MOUNTAINS
CAL
B


AL PARK
4180
B
LLARVILLE
OKOTOKS
URBAN SATELLITE
2400
BLACK DIAMOND
940
HIGH RIVER
C
LONGVIEW
CAYLEY
NANTON

LEGEND

- - - - STUDY BOUNDARY

2620 AVERAGE ANNUAL SUMMER TRAFFIC (DAILY)

● URBAN SATELLITE

◉ REGIONAL SERVICE

○ LOCAL SERVICE

• BASIC SERVICE

■ TOURISM ATTRACTIONS

EXISTING TOURISM PATTERNS AND SERVICE CENTRES

FOOTHILLS TOURISM DESTINATION RESORT PLAN

NORTH

SCALE 1 : 250 000

0 5km 10km 20km

FIGURE

1

sites. There are also 12 restaurants in the zone, most of which are not geared towards the tourist industry. There are, however, four guest ranches and 11 bed and breakfast homes which cater specifically to tourists. There is a major equestrian development at Spruce Meadows, south of Calgary and a guest ranch development, Maximum West, targetted at international tourism markets included in this zone.

Agriculture and oil and gas extraction provide most of the employment in the area. However, since 1981, the employment rate has declined, and population growth has been practically nil, with some centres declining.

Zone C - Highway 2 Corridor

Zone C extends south from Calgary along Highways 2 and 2A, and includes gently rolling lands that are largely used for agriculture. It includes the towns of High River, Nanton and Okotoks as well as the hamlets of DeWinton and Cayley. Zone C is the most populated zone in the study area (20 500). Eighty-five percent of the residents are located in the three towns. The influence of the city of Calgary increases with proximity: Okotoks has approximately 65 percent of its work force employed in Calgary, while 23 percent of the High River residents commute to the city.

This zone has experienced the greatest growth rate during the last three years. Since 1986, the towns of Okotoks and High River have grown by approximately 15 percent and four percent respectively. Zone C also has a relatively well developed service industry with five hotels supplying 144 units (although none of these specializes in servicing the recreational tourist trade). Thirty-one restaurants are located in the area. Several, including four fine dining, two tea houses and one specialty restaurant appeal to tourists. There are six campgrounds providing 448 camping sites, within this zone.

2.4 Natural Features

The study area presents an attractive and scenic landscape to tourists. However, this landscape has always been overshadowed by the more dramatic mountain landscape to the west, and tourists tend to view the study area as a "scenic drive" to access the mountain areas.

There are seven Natural Areas that recognize significant natural features, but none of these are tourism attractions; only Brown Lowery and Foothills are shown on tourist maps. Three provincial parks are located within the study area. Big Hill Springs and Bragg Creek are limited to day use while two campgrounds in Bow Valley Provincial Park supply 246 camping sites. A grazing lease at the southern end of the zone offers spectacular beauty, but its primary recreation/tourism use is hunting.

The climate is an important consideration which affects the potential to attract tourists. The area weather is highly influenced by the proximity to the mountains, and can receive strong winds through mountain passes, as well as sudden temperature changes and precipitation related to descending air masses which have passed over the mountains. High average daily sunshine and a relatively long summer season (approximately 96 days when the temperature is 18°C or greater) create an opportunity for land-based recreation in the summer, but unpredictability limits the potential for summer resorts.

Though winter is the longest season (198 days) its severity is moderated by periodic chinooks. High River experiences an average of 30 days with chinooks during winter. This moderation encourages an extended season for activities like trail riding and hiking, but limits winter activities like skiing and snowmobiling, since snow cover is unreliable. The area is generally dry, with the least precipitation in winter and spring.

The drainage of rivers from the mountains provides an important feature of the study area: cool, clear, fast flowing waters. There are four significant rivers: the Bow, the Elbow, the Highwood, and the Sheep. In addition, there are a multitude of small creeks. All of these provide recreational potential. Fishing is the most common tourist use, although there is increasing interest in rafting adventure opportunities on the Bow and Highwood Rivers.

The study area provides a wide variety of habitat suitable for wildlife. The mountainous valley in Zone A offers opportunities to view several large species including elk, white-tailed and mule deer, and black bear (and rare evidence of grizzly bear, cougars and wolves). It is also capable of supporting furbearing animals such as the red squirrel, marten, beaver and coyote. The southwest area, with its south facing slopes, also provides crucial winter grazing for many ungulates and habitat for furbearers such as muskrats and weasels. A variety of upland birds (including ruffled grouse, spruce grouse and raptors) are also common to the area.

2.5 Cultural Features

The area is rich in evidence of cultural history from the past 11 000 years.

Archaeologists have discovered proof that humans were in this area at least 11 000 years ago. Evidence suggests that aboriginal peoples migrated south from the Bering Strait along the ice-free corridor through this area. There appears to be evidence of nomadic peoples and cultures since that time. The Longview "Tipi Rings" and the "Old Women's Buffalo Jump" near Cayley provide examples of recent native history.

The arrival of the white man during the mid 1700s had only a minor impact initially. Small outposts like the fur trading post at Spitzee Crossing (near High River and Priddis) were constructed and maintained through the 1800s. However, in the latter part of the nineteenth century, agricultural lifestyles began to dominate the region. By the 1890s, large ranches like the Bar-U and the Cochrane had been established in the area. Farming had also begun to prosper in the region with the completion of the CPR to Calgary and the subsequent southern branch lines.

More recently, oil and gas exploration has dominated economic development of the area. With the discovery of oil in Turner Valley in 1914, industrial expansion occurred so rapidily that 500 oil companies were established locally within months. After World War I, the oil boom was rekindled causing further expansion of the Turner Valley area. By 1951 Turner Valley was supplying much of the gas for consumers in southern Alberta. Many remnants of the gas boom are still present (the Dingman #1 Wellsite, the original Okalta Oil Company field office, and Hell's Half Acre).

There are four museums and one historical ranch currently operating in the study area. The Sarcee Museum is located on the Sarcee Indian Reserve No. 145 and contains native artifacts. There is a desire to increase the visibility of the museum and ultimately attract more visitors. The Museum at the Highwood is also devoted to regional natural history and includes displays from the native and early agricultural years. This museum is also attempting to enhance its profile by expanding into steam train history. The Nanton Air Museum concentrates on the development of the aviation industry with particular emphasis on the local training of pilots during World War II. A privately owned museum located at the Rafter Six Guest Ranch describes regional native culture, early settlement, and N.W.M.P. artifacts. It is based upon the oral cultural traditions of the Blackfoot Nations, and is called the "Passing of the Legends". The Cochrane Ranche Provincial Historic Site, located on the site of the original ranch, provides interpretation of the development and operation of this early ranch. Also, the Christ Church at Millarville is noted as a significant representative of 1890s architecture.

2.6 Recreation Features and Services

There are three provincial parks located within the study area. Big Hill Springs and Bragg Creek are limited to day use while two campgrounds in Bow Valley supply 246 camping sites.

The recreational services and facilities of the area respond to three primary factors: (1) the mountain and foothills topography, (2) the western theme and ranchland terrain, and (3) the proximity to Calgary.

The foothills topography provides opportunities for land-based activities like camping, hiking, hunting and scenic drives. There are also attractive opportunities for river and stream recreation. The Bow, Elbow and Highwood rivers provide ample locations for both fishing and river adventures. Presently there are nine float fishing/guide services listed in the area. Though seven of the companies are operated out of Calgary, the remaining two are located in the immediate study area. Moreover, all nine companies use the Bow River west of Calgary for their business operations, and two use the Highwood River for white water rafting adventures. There are also 69 outfitters and outfitter guides located within the study area.

The western/ranch theme is an increasingly popular base for recreational opportunities. From chuckwagon adventures organized out of Longview to guest ranches, the lure and romance of the cowboy lifestyle is widespread. Other evidence of the importance of this western theme are the storefront developments in Longview and High River, the numerous rodeos held in the area (one is held every Saturday night in Nanton during the summer) and the development of indoor riding/roping arenas.

The proximity to Calgary has meant that the study area has become a rural escape for many urban dwellers. Representatives from all of the major service centres suggested that day travellers from Calgary remain one of the main tourism markets. The tea shops in High River and Cayley and the arts community of Cochrane all experience increased business as a result of Calgary day travellers.

Increasingly, Calgarians are using the study area as an area for seasonal outdoor recreational activities like golfing and skiing. Seasonal attractions such as the golf courses in the area and the Wintergreen ski resort rely heavily upon Calgary residents for supporting memberships.

2.7 Access and Travel Patterns

Road Access

The study area includes some of the busiest highways in the province of Alberta. Highway 1 provides the major east-west access while Highways 2, 2A and 22 create a north-south flow of traffic through the area.

Highway 1 is the major highway in the study area, providing access to the mountain parks and to major urban centres. Highway 2 is also important as it provides the major access for United States traffic. Highway 22 provides access from the north and has also become a convenient route for northern travellers wishing to bypass the city of Calgary on their way to Banff and British Columbia.

Highways 22X, 7, and 8, and Secondary 543 provide important access to the Foothills and Kananaskis Country. Touring recreational traffic is common on all of these roads. Access to Kananaskis Country is a noticeable generator of tourist traffic, even though access from the north (Highway 40) is far more popular.

Commercial Carrier Access

The Foothills area is highly accessible to tourists who choose commercial transport rather than private automobile. The proximity of the area to Calgary International Airport makes it possible for travellers from around the world to fly into the area. Airline access is complemented by car rental opportunities, and by passenger bus service into the area.

Scheduled passenger bus service is available to several towns in the study area (Cochrane, Black Diamond, Turner Valley, High River and Nanton). However, bus connections for tourists are not convenient, and the passenger handling facilities in towns in the Foothills area do not promote tourist use of these facilities.

Tourists also enter the area on the CPR mainline, often travelling through the world-famous route through the Rockies. They can disembark at Calgary, but to travel into the Foothills area, they must arrange a vehicle rental or take a bus. A southern spur of the CPR extends south through to Nanton, but passenger service is not offered. VIA Rail has also announced plans to discontinue year-round rail service from central Canada. Service will be limited to summer excursions only.

2.8 Existing Recreational Use

Specific recreational uses in the area are described below.

Spruce Meadows

Spruce Meadows, an internationally recognized equestrian centre, attracts more than 200 000 visitors annually to its events (see Appendix 5). The events onsite include three major show jumping tournaments, and an equestrian fair. The centre is advertised internationally and attracts the majority of its attendance from national and international markets. Major tournaments receive international television coverage. This development is without peer in the study area, a major success story in international tourism development.

Camping

Within the study area, most visitors camp for one of two reasons: (a) a simple overnight stop-off along the Trans-Canada Highway, or (b) a brief vacation from the city of Calgary.

The majority of campgrounds are found in the Bow Valley, although a few small campgrounds are found in Zones B and C. Given the close proximity to Banff and Kananaskis Country, the demand for destination camping is limited.

Table 2.1

PRIMARY PLACE OF RESIDENCE
FOR CAMPING PARTIES
Bow Valley P.P., 1988

	(%)
• Calgary	61.2
• Other Alberta	11.7
• United States	10.1
• Other (Cdn. & Int'l.)	6.3
• Edmonton	6.1
• British Columbia	4.6

(Most visitors travel between .5 and 1.5 hours to the Parks.)

Source: Alberta Recreation and Parks. Annual Visitor Statistics, 1988.

From April 15 to September 15, 1989 the two campgrounds at Bow Valley Provincial Park recorded 38 295 campers (an increase of nine percent over 1988 figures). The majority of campers visiting the provincial parks travel less than 1.5 hours to camp (see Table 2.1, page 8). Sixty-one percent of the area campers reside in Calgary. Most of the local campgrounds in the area reported high occupancy rates during summer weekends, with lower mid-week use. The camping season is limited to approximately 15 weeks, although some increase in shoulder season use has been reported.

Day Use (Picnics and Casual Walks)

Day use in the Provincial Parks has risen by three percent in the last year. In 1989, Bragg Creek, Bow Valley and Willow Creek received 95 038 day use visitors. Day use accounts for over 70 percent of park visitors in the area. The Brown Lowery and Foothills Natural Areas are also reported to host several day use visitors during the summer months.

Hunting

Hunting is also a popular tourist activity within the study area (16 000* hunters in 1982). This is understandable given the variety of big game within the area. In the response to hunting demand, 69 local guides/outfitters have registered with the provincial regulating body. Though all of their hunting activity may not take place in the area, the number of registered guides provides an indication of the importance of hunting to the area residents. (*Source: Alberta Travel Survey, 1982.)

Bed and Breakfast/Guest Ranches

The High Country Bed and Breakfast Bureau has been operating in the study area since 1987. Members have been operating independently since 1985. The Bureau is experiencing increased popularity. The number of participating households has risen from seven in 1988 to 11 in 1989. A membership of 14 participating households is expected for 1990.

The primary market is out-of-province visitors. International visitors account for the majority of the clientele. Respondents indicated that the majority of the clients limit their stay to one night and are generally touring western Canada while staying at several bed and breakfast homes.

The area's guest ranches offer extended stay packages in western style accommodation. A number of activities, ranging from trail rides and ranch activities to rodeos are available to the visitor. New marketing initiatives currently undertaken by guest ranch operators include a greater concentration on touring packages and increased attention to visitors flying in to Calgary.

Museums/Displays

In 1982, 30 percent* of visitors to the area reported that they visited museums and displays. This percentage has likely risen since then, because the range and quality of museums and displays has improved. (*Source: Alberta Travel Survey, 1982.)

The two major museums in the area are the Nanton Air Museum and the Museum at the Highwood. Each museum attracted 20 000 and 5 000 registered visitors respectively during the summer season. Both museums have experienced a greater number of visitations during the last two years. Currently the Nanton Air Museum hires six staff members to handle its summer patrons. The Cochrane Ranche Provincial Historic Site had 31 559 visitors in 1989, 33 588 in 1988, and 22 088 in 1987. (See Appendix 5.)

Visiting Friends and Relatives

In 1986 this market accounted for more than half of the travellers to the area (52 percent in Zone A; 55 percent in Zones B and C). These proportions have remained relatively constant over the past several years.

Off-Season Recreation Patterns

The area is not established as a winter recreation attraction. However, the number of visitors during colder months has steadily increased. This is primarily due to an increase in facilities catering to cold season users, but also partly due to an increased interest in year-round outdoor recreation. As with most areas in Alberta, the Foothills area experiences a reduced primary market area during cold seasons: residents of Calgary and area become the market.

Wintergreen resort has been very successful at attracting the Calgary market to downhill ski facilities in the Foothills (over 99 000 users last year). Guest ranches in the area also attracted users for cross-country skiing, snowshoeing, tobogganing and sleigh rides. However, chinooks and low precipitation make snow conditions highly variable, and these activities have to be marketed on an opportunistic basis unless the facility offers snow-making equipment (as Wintergreen does).

Indoor sporting activities are popular during winter. Curling bonspiels and hockey tournaments attracted almost 8 700 visitors in 1988 - 1989 (see Appendix 5). Two winter carnivals are also held in the area.

Windsurfing

The Ghost River Reservoir lies approximately 61 kilometres west of Calgary and is an attractive recreational area for local sailboarders. A private operator on the reservoir estimated over 32 000 visitors in 1988. The majority of these visitors travel from Calgary for day visits.

Golfing

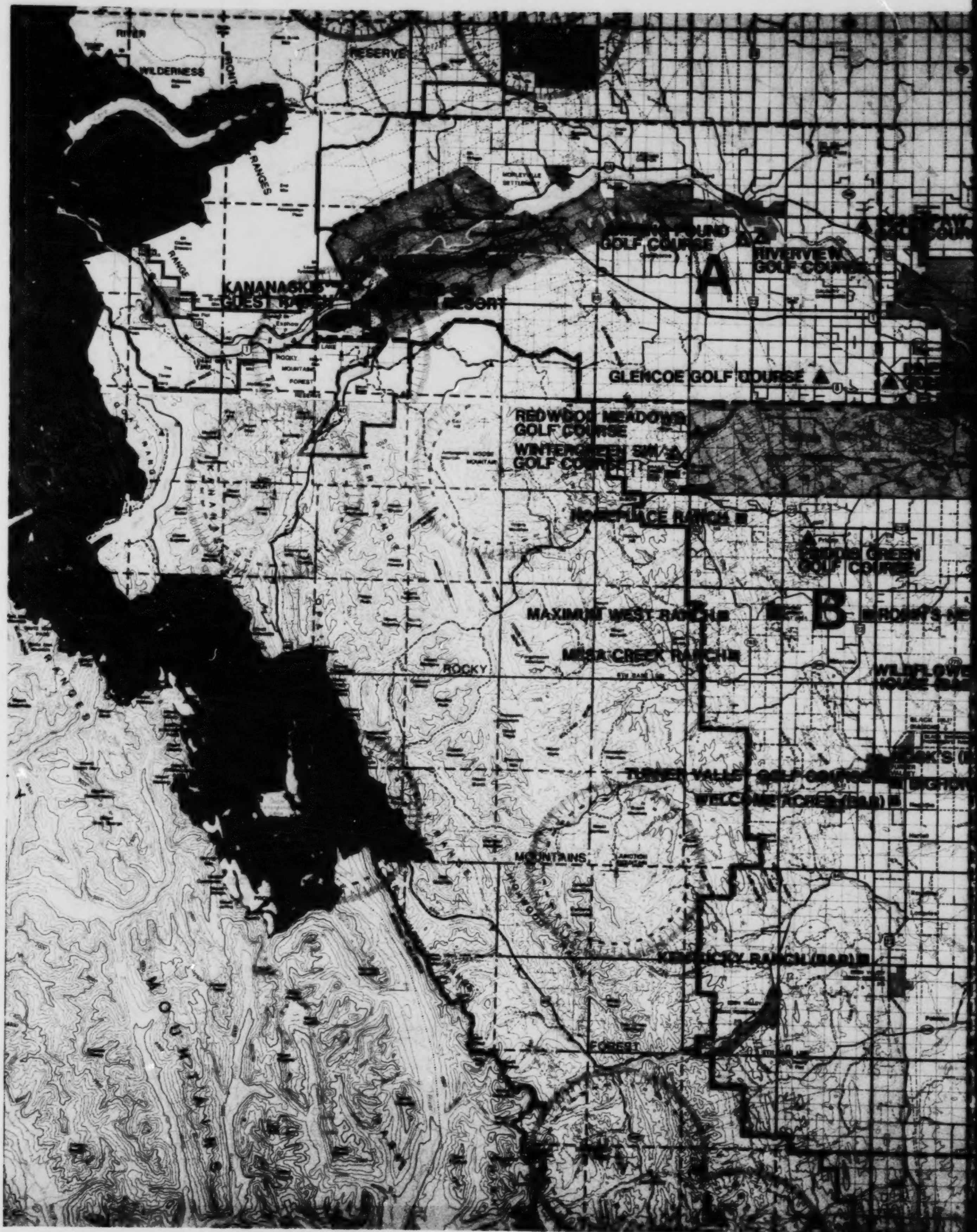
There are presently five golf courses in the study area. These courses are reported to host between 30 000 to 40 000 rounds of golf per club per year. All of the golf courses have reported experiencing increased play during the last five years and many are currently nearing capacity. The golf courses will host approximately 125 tournaments in an average year with 70 percent to 80 percent of the tournament play coming from Calgary clients. Despite the fact that six new golf courses (see map, Figure 2) are planned for the near future, individuals contacted reported that growing demand will support the increased supply. The tourism impact of most of the courses under development will be limited by the fact that they are private clubs.

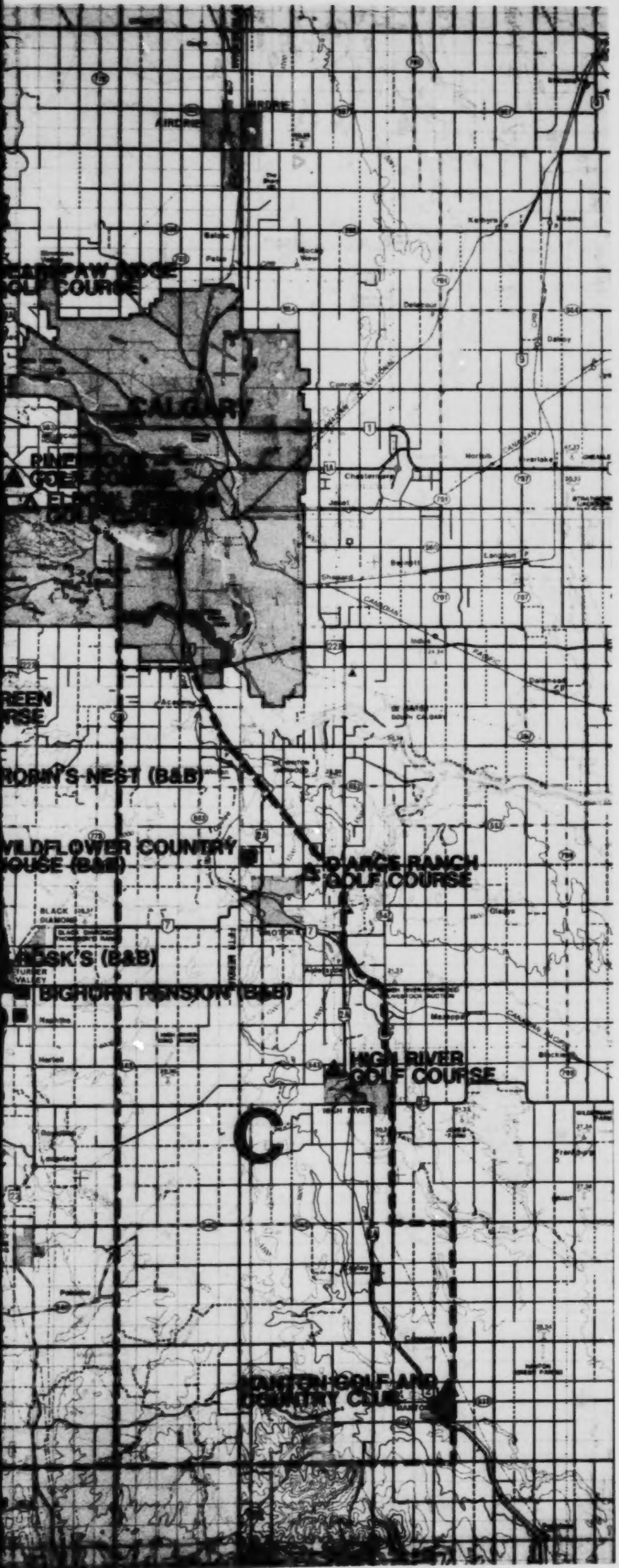
Special Events

A variety of events ranging from North American Championships to country fairs are held in the region on an annual basis. During 1989, approximately 27 400 visitors were attracted to 11 special events. Though no accurate figures have been compiled, event managers suggested that as many as 70 percent of the participants could come from outside the immediate area.

Rodeos

Professional and amateur rodeos drew approximately 34 000 participants/spectators to the area during the summer of 1989. Of this total approximately 16 000 were from outside the study area. An additional rodeo drawing between 6 000 and 10 000 on an annual basis was recently dropped from the professional circuit.


RIVER
WILDERNESS
FRONT
RESERVE
RANGES
RANGE
MORLEYVILLE SETTLEMENT
GOLF COURSE
A
RIVERVIEW GOLF COURSE
KANANASKIS GUEST RANCH
RESORT
ROCKY MOUNTAIN FOREST RESERVE
GLENCOE GOLF COURSE
REDWOOD MEADOWS GOLF COURSE
WINTERGREEN SKI & GOLF COURSE
MOOSE MOUNTAIN
HOMEPLACE RANCH
GOLF COURSE
MAXIMUM WEST RANCH
B
MESA CREEK RANCH
WILDFLOWE
HOUSE
ROCKY
BLACK DIAMOND
TURNER VALLEY GOLF COURSE
WELCOME ACRES (B&B)
MOUNTAINS
KENTUCKY RANCH (B&B)
FOREST
MOUNTAINS


AIRDRIE
GOLF COURSE
CALGARY
REEN
RSE
ROBIN'S NEST (B&B)
WILDFLOWER COUNTRY
OUSE (B&B)
D'ARCY RANCH
GOLF COURSE
OSK'S (B&B)
BIGHORN PENSION (B&B)
HIGH RIVER
GOLF COURSE
C
NANTON GOLF AND
COUNTRY CLUB

LEGEND

---- STUDY BOUNDARY

▲ GOLF COURSES - EXISTING

△ GOLF COURSES - PROPOSED

■ ACCOMMODATION

TOURISM SERVICES

FOOTHILLS TOURISM DESTINATION RESORT PLAN

NORTH

SCALE 1 : 250 000

0 5km 10km 20km

FIGURE

2

Table 2.2

COMPARISON OF TRIP PURPOSE BETWEEN THE TWO PRIMARY TOURISM ZONES IN STUDY AREA

ZONE 10 - CALGARY & DISTRICT, 1986

TRIP PURPOSE	
• Visit Friends/Relatives	29%
• Pleasure	33%
• Personal	12%
• Business/Convention	26%

ZONE 1 - CHINOOK COUNTRY, 1986

TRIP PURPOSE	
• Visit Friends/Relatives	33%
• Pleasure	40%
• Personal	11%
• Business/Convention	16%

Source: Canadian Travel Survey, 1986

Table 2.3

COMPARISON OF ACTIVITIES PARTICIPATED IN BY TOURISTS IN ZONE 1 AND ZONE 10

ZONE 10 - CALGARY & DISTRICT, 1986

ACTIVITIES PARTICIPATED IN DURING TRIP	
• Visiting Friends/Relatives	52%
• Shopping	39%
• Night Life/Recreational Activities	14%
• Sports/Outdoor Activities	10%

ZONE 1 - CHINOOK COUNTRY, 1986

ACTIVITIES PARTICIPATED IN DURING TRIP	
• Visiting Friends/Relatives	55%
• Shopping	35%
• Night Life/Recreational Activities	14%
• Sports/Outdoor Activities	19%

Source: Canadian Travel Survey, 1986.

The existing recreational use of the area is affected by both the natural resources and the proximity to the city. Table 2.2 and Table 2.3 above, describe the use patterns in 1986 for both the Calgary area, and the Chinook Tourism Zone, which includes Nanton, Turner Valley, High River, and Longview. It is interesting that the more urban zone (10) exhibits patterns that are highly similar to the more rural zone (1).

2.9 Tourism Attitudes, Awareness and Service

Attitudes towards tourism and tourists were determined as a result of telephone interviews with community representatives in the study region, and a review of Community Tourism Action Plans provided by Alberta Tourism (see Appendix 3).

Following the XV Winter Olympics, awareness of tourism benefits and potential is relatively high. Residents of the area have an understanding that national and international tourists are interested in the area.

However, attitudes towards tourists in the area vary greatly. In Zone B, the attitude towards tourists is often cautious: ranchers and oilfield personnel view tourists as a potential management problem, and recreational landholders view tourists as a threat to the quiet rural values and environment. Business people in the service centres may be the only ones who desire tourism growth.

In Zone C, there is a perception that tourists are a benefit to the local economy. However, most business people (even those located on Highway 2) view tourists as a supplementary market ("nice if you can get them"). There is a lack of belief that investments in tourist services will pay off.

In Zone A, most people are aware of the benefits of tourism and see tourists as a desirable source of economic growth. However, there appears to be a lack of understanding about how to capitalize upon the tourism business. There is also a very real understanding that the tourists travelling on the Trans-Canada Highway are in a hurry to reach Banff or Calgary, and are not inclined to stop.

In general, few businesses have made significant changes in their business plan or their premises to attract recreational tourists. Services throughout the region are adequate, but not memorable or unusually attractive. The service skills of the staff tend to be friendly, but often do not project "polish" or competence that tourists find supportive. There is a general lack of understanding of the needs of specific kinds of tourism markets, subsequently a general lack of targetted tourism marketing within and outside the region. There are some tourism businesses, primarily guest ranch operators, which have been developing aggressive market strategies aimed at the national and international market places.

CHAPTER • THREE

MARKET ANALYSIS

This section describes the existing and potential tourism markets for the study area and the likelihood that these markets will respond to tourism developments. (See Figure 3.) Existing travel to the region is predominantly from within Alberta, specifically from central and southern Alberta. The Bow Valley has demonstrated the highest tourism visitation levels within the province. The region also serves as a major "pass through" for vehicle travellers going north and south, from and to the northern United States, and east and west between British Columbia, the Rocky Mountain Parks and Calgary. Important sources referenced to develop this chapter included the Community Tourism Action Plans, publications from the Calgary Regional Planning Commission, Canadian Travel Survey data, Alberta Bureau of Statistics information, and Tourism Destination Area Studies.

3.1 Market Size

The study region has a resident population of over 40 000. The population within a three hour driving distance is significant. Market strategies completed by the Chinook Country Tourist Association and the Calgary Convention and Tourism Authority recognize the importance of local and regional tourism travel.

Local Market

The local market includes those people that reside within the local trading areas for the communities within the study area. The Calgary Regional Planning Commission, identifies specific retail trading areas for middle order goods and services (eg. tourism services) centred around the communities of Cochrane, Turner Valley - Black Diamond, Okotoks, High River and Nanton. Tourism movement between these areas within the region is important, particularly for regional and special events. The population, including native people, within the study area was calculated to be 40 369 (Census 1986). This market is expected to account for 15 percent of tourism activity in the study area, over the next five years. (Although some Calgary residents use services within the study area, they are not included here since the overwhelming number of city residents do not regularly travel to the Foothills area.)

Secondary Market

It is the size of the secondary market available to the study area that makes tourism developments here feasible. This market area includes all residents living within a three hour drive of any attraction in the study area. Past research and experience has indicated that a major "fatigue point" is reached after three hours of travel. It is at this point that tourists will decide to stop and "refresh" themselves or make an overnight stop. A population of nearly 2 000 000 is included in this area (over 80 percent of this population is located in Calgary, Edmonton, or the urban corridor between these cities). Although many Edmonton households are beyond a three hour drive, it is assumed that they will act as if they were marginally within the three hour perimeter.

The secondary market includes two critically different sub-markets:

Calgary Market: The Calgary market is close at hand, has developed a tradition of touring through the Foothills area, and is more familiar with the area.

Northern Market: The centres north of the study area are less familiar with it, and have traditionally focussed their vacation activities on the city of Calgary and Banff National Park.

In the next five years, the secondary market is expected to account for 62 percent of the area's tourism visitation.

Western Canadian Market

This market includes all of western Canada, minus the secondary market described previously. The area includes more than 4 500 000 residents. Within this market, the most significant source of local visitation is British Columbia; Saskatchewan appears to contribute about two-thirds as many visitors (1986 Canadian Travel Survey). Manitoba contributes fewer visitors, given its distance from the study area, and proximity to central and eastern attractions. This market is expected to contribute 15 percent of the area's tourism visitation over the next five years.

The North American Market

Beyond western Canada, the remainder of North America has been classified as a single market group. There are two reasons for this:

(1) zone visitation from individual points of origin is not accurately measured, and

(2) the visitation from these more distant origins is relatively dispersed, making targetting more difficult.

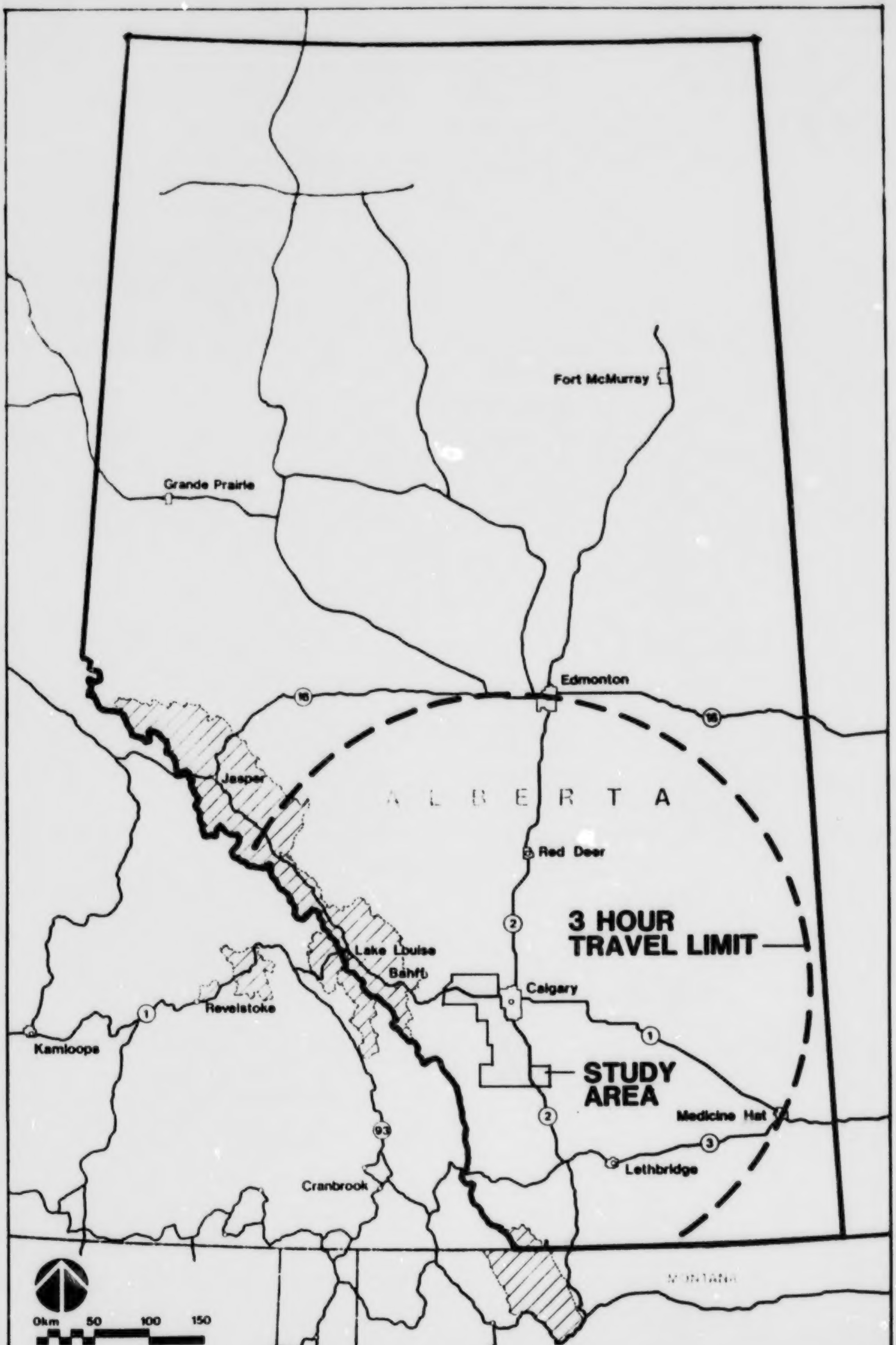
Nevertheless, regional areas that generate the highest visitation from this broad market include the following (in order of highest origin):

- Southern Ontario
- California
- Pacific Northwest States
- North Central States

This market is expected to contribute almost five percent of visitors to the region over the next five years.

Offshore Market

All visitors who reside in areas other than North America have been lumped into a single broad category: the offshore market. Despite the huge numbers of people who live in this market area, current visitation to the zone from this market is relatively small. It is estimated that approximately five percent of annual total visitation to the Foothills area comes from offshore origins (Team Tourism Marketing Plans, 1986). The potential for attractions within the region to attract offshore visitors must be considered. However, for most area attractions, this will be a supplemental market rather than a sustaining market.



Fort McMurray
Grande Prairie
Edmonton
16
16
Jasper
A L B E R T A
Red Deer
2
3 HOUR
TRAVEL LIMIT
Lake Louise
Banff
Calgary
Revelstoke
1
1
Kamloops
STUDY
AREA
2
Medicine Hat
3
93
Lethbridge
Cranbrook
MONTANA
0km 50 100 150

MARKET REGION

FIGURE 3

While the growth of visitation from some offshore markets is highly encouraging, it is expected that most attractions in the study area will not derive ongoing income from these markets. Of particular interest within this huge marketplace are visitors from Britain (who are anticipated to be predominantly visiting friends and relatives), Germany (growth in adventure vacations), South East Asia (organized tour vacations to world-famous locations), and Australia (touring and adventure). Overall, this market is expected to contribute about three percent of visitors to the area over the next five years.

3.2 Key Market Segments

Tourism market segments more specifically identify tourist groups within the geographic market categories described above. Segmenting allows operators of tourist attractions, events, and services to understand and respond to tourist needs more specifically and be directed in their marketing efforts to increase tourism visitation.

3.2.1 Household Segments

Household segments are described on the basis of the household unit which potential travellers represent. The percentage of markets within these segments is indicated in Tables 3.1 and 3.2 below.

Family Segment

For the purposes of this study this segment was defined as including all travellers who live as a family unit (with children) and travel with children. Previous measures of this market (1982 Alberta Travel Study) indicated that between 35 and 40 percent of the vacation market in this area were families. In 1987, the Calgary Tourism and Convention Bureau projected that 37 percent of their visitors were families.

Single/Couple Segment

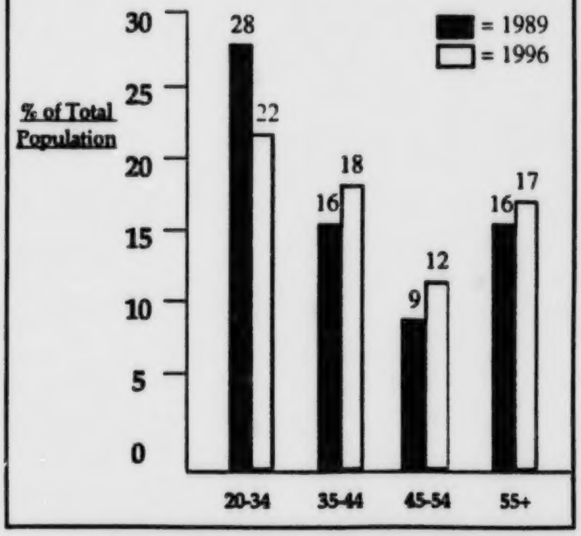
This segment was defined to include all vacation travellers ages 20 to 55, who travel without children, and live either alone or with one other adult. It is estimated that this market accounts for between 25 and 30 percent of the vacation market for the study area.

Mature Segment

The mature tourist segment includes all visitors 55 years of age and over. This market is growing and represented approximately 16 percent of Canadian tourist visitors (400 000) in 1986. Those households within this market that are affluent and in good health tend to travel extensively. This group has highly specific service requirements, and is generally price-sensitive, although not so when the "right opportunity" is presented.

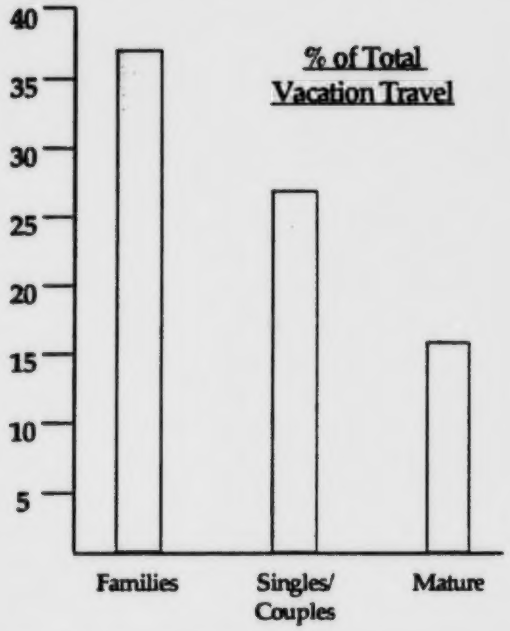
Table 3.1

PROJECTED SHIFT IN
POPULATION STRUCTURE
BY AGE GROUP CATEGORY
1989 - 1996



Source: Alberta Bureau of Statistics (1988)

Table 3.2:
ESTIMATED PERCENTAGE OF VACATION TRAVELLERS TO STUDY AREA



Estimated from Canadian Travel Survey, 1986
and Alberta Travel Survey, 1982

3.2.2 Vacation Segments

These segments are described on the basis of the trip purpose which has motivated the traveller to enter the study area.

Touring Vacation Segment

The largest potential vacation market from outside Alberta is the touring vacation segment. The most recent studies by Statistics Canada estimate that at least 55 percent of U.S. visitors to Alberta fall within this category. These vacationers travel to the study area predominantly by car or recreation vehicle, with the intention of seeking out new and different experiences. They have no single focus, but instead are looking for a mix of vacation products. They are attracted to the study area primarily by its proximity to the scenic Rocky Mountains and the Calgary Stampede.

Outdoor/Adventure Segment

The adventure segment includes all those visitors who come to the area with the primary intention of seeking an outdoor challenge. It is an important market for the area, and it is catered to by several tourism services: guest ranches, rafting tours, and the ski hill all attract specific kinds of adventure vacationers. It appears that this market will continue to grow over the next five years, and this is reflected by investment in all of the services mentioned previously.

Enroute

This market includes all vacationers who travel through the study area enroute to other destinations. The predominant route for these trips is the Trans-Canada Highway, but there is also significant vacation traffic on Highway 2 south, Highway 22 and 1A near Cochrane, and through several routes into Kananaskis Country. While over 1 000 000 vacationers come through the study area in this way, they are not easily stopped. It is expected that themed attractions, accommodations and food services will experience the greatest success, and that convenience of location, and scenery will greatly affect the capture ratio.

Tour Groups

Personal communication with representatives of the Calgary and Convention and Tourist Bureau indicate that approximately 1 000 tour packages (representing 250 000 travellers annually) operate in the Calgary area. Tourism service operators indicated that there are opportunities to provide services to these tour groups, particularly in packaging points of interest that also have food services and retail sales/souvenirs and gifts.

Hunters

Guides in the region provided services to 16 000 hunters during 1988. During research for this study, tourism services operators (accommodation and restaurants) indicated that they benefit from unguided hunters seeking upland and big game during the autumn, particularly in the southern portion of the study region.

Visiting Friends and Relatives

This market segment includes all people who travel to the study area primarily because they want to visit with friends and relatives. It is estimated that this is currently the largest vacation segment in the area. These vacationers tend to be interested in day touring through the area, souvenir purchases, memorable experiences, and visiting attractions. This market is fascinated with Banff and the Rockies, but the Foothills may emerge as an alternate tour area on return visits.

3.2.3 Special Interest Markets

There is an opportunity to capture increased tourism business from the special interest tourism markets that are currently travelling to, or who could be encouraged to travel to the study region. These "special interest" groups include:

Aboriginal People: An estimated 20 000 aboriginal visitors currently travel to the study area annually (see Appendix 5). These people have demonstrated an increased propensity to travel over the past several years.

Industrial Markets: (Agriculture, Oil and Gas) There is extensive industrial traffic to the city of Calgary. Related developments such as unique livestock breeding (eg. equine related) or technological changes, or historical and educational attractions (eg. potential development of the Turner Valley Oilfield Centre) related to the industry may attract this market.

Pre and Post Convention Travellers: The Calgary Tourism & Convention Bureau indicates that there were 174 provincial, national and international conventions representing 108 000 registrants in 1988. There is a significant opportunity to package events, attractions and services in the area as tour opportunities for convention delegates.

School Children: Proposed and existing historical interpretive developments (eg. Western Heritage Centre, Bar-U, Cochrane Ranche, Okotoks Erratic, Hell's Half Acre have direct relationships with curricula for grades three, four, five and eight. There are 3 838 students (grades 1-12) in the region and 107 800 students in the Calgary area.

3.3 Market Perceptions

The secondary market tends to see the Foothills area as being "on the way to the mountains". The region is seen to be a tourism destination for a day trip or as part of the enroute experience. Portions of the region are perceived to be extensions of Calgary (eg. Bragg Creek, Okotoks, Cochrane).

Market perception analysis was undertaken by reviewing comparative studies, talking with local tourism leaders (see Appendix 3), and undertaking focus groups to predict market response (see Appendix 1).

The perceptions that all markets hold of the study area are dominated by the image of the Canadian Rockies as a destination area, and to a lesser degree by the image of Calgary as the Stampede/Olympic city. The perception that the Rockies will be scenic and beautiful is by far the most dominant factor for vacation decisions regarding this area. Other potential strengths for the area are:

- Relaxing
- Old west/Ranching Image
- Sunny Climate

However, the area lacks an image of its own. Most visitors therefore perceive a lack of services in the area, and a lack of things to do. The area is seen as being "on the way to the mountains". This perception is reflected locally by the travel behaviour of Calgarians, who travel regularly through the area on the way to Banff and Kananaskis Country, but rarely stop on the way. There is also a "day trip" tradition, however, which motivates Calgarians to travel to selected recreation sites and food outlets within the study area (eg. MacKay's Ice Cream at Cochrane, various outlets at Bragg Creek). This tradition may indicate that the perception of scenery and "a rural treat" could be translated into improved visitor expenditures.

Touring Vacation Needs

A review of focus group responses and comparative data from Colorado suggests that the area must be perceived to have the following attributes in order to successfully attract touring vacationers (listed in order of importance):

- Beautiful scenery
- Lots to see and do
- Convenience (on a major route)
- Many points of interest
- A world-class attraction
- An opportunity to experience our history
- Unique, high quality accommodation
- Experience different cultures/ways of life

The perceptions of the study area appear to be weak in all of these important areas. In several cases, there is a need to develop new facilities to create a more attractive sales package. However, perceptions about scenery, history and different ways of life may be changed in large part through promotional efforts.

Attractions and Services

The area is perceived to lack attractions and services. Focus group respondents indicated that they would look for the following attractions when making a decision about touring the study area:

• Scenic park	(90%)
• Excellent interpretive centre	(79%)
• Family resort with adult & child activities	(74%)
• Ranch or farm visit	(68%)

Given that such an attraction was present, these vacationers would also look for adequate supporting services and infrastructure.

Themes

Several themes were tested in a focus group setting to determine which had greatest potential to form the basis of an attraction in the area. The results indicated the following order of preference:

- Western Heritage
- Native Culture
- Historic Ranch
- Hell's Half Acre (oil and gas)

These results indicate that both the ranching and the aboriginal themes have potential strength within Alberta. It is anticipated that the international market will preferentially respond to the "native Indian culture" theme.

3.4 Population Growth

Population growth in the study area is variable. Communities in the region that are considered to be extensions of Calgary (eg. Okotoks and Cochrane), anticipate significant growth (five percent per year) over the next five years. Other major centres in the secondary market are experiencing sustained growth (eg. Red Deer, Lethbridge). The population increase in the primary and secondary market areas will be important to major tourism developments in the study region.

On the other hand, communities in Zone B have experienced population loss recently and anticipate status quo conditions for the next five years. There is a trend in these areas, however, for up-scale urbanites to purchase recreational lots, which may increase local population.

Within the secondary market, growth is moderate with one exception. Currently, the growth of the city of Calgary is accelerated, although other centres indicate slower growth patterns.

If we assume that the local and secondary market areas will grow at an average rate of one percent each year, then these markets will grow by approximately 100 000 people over a five year period.

3.5 Other Factors

There are several external factors that will affect the potential for tourism to grow in the region.

1988 Winter Olympics

The world-wide publicity surrounding the 1988 Olympics in the Calgary - Banff area has created significantly more awareness and interest. The Foothills area can capitalize upon this "Olympic shadow" to create increased visitation.

Banff Congestion

The increasing congestion in Banff has created an opportunity to attract visitors to alternate locations. There may be an opportunity to attract Banff visitors to a more rural, and less congested scenic alternative. The key to create this kind of attraction will be to blend imagery (mountain scenery) and emphasize memorable cultural experiences and outdoor activities.

Calgary and District Marketing Area

The Foothills area does not benefit uniformly from current marketing programs. While it is aligned most closely with Calgary and district in terms of marketing image, the area is divided among three tourist zones in terms of marketing dollars and guidance. This contributes to a diffused image, and makes it difficult to co-ordinate themes and promotions.

Indian Reserves

Up until now, the several Indian Reserves in the area have played a low-key role in the tourism business. These reserve lands are significant holdings within the Foothills study area, and several (particularly the Stoney Reserves) appear to have tourism potential. If the Reserves decide to become active tourism developers, they may face a local "image" problem, but may also find that they have a significant national and international market.

The Trail of the Great Bear

Alberta and Montana are currently co-operating to assess the feasibility of establishing an international touring route from Yellowstone National Park to Banff National Park. The Alberta portion would include the Foothills region. Should the opportunity be demonstrated to be feasible, there could be important tourism development opportunities aimed at enroute traffic using the Trail of the Great Bear. Alberta Tourism is undertaking a detailed study of this concept.

CHAPTER • FOUR

REGIONAL REQUIREMENTS FOR TOURISM GROWTH

The study area is circumscribed by three strong tourism destination areas: Calgary, Banff and Kananaskis Country. However, tourism destination development within the area has been limited. The major staples of the economy for the past several years have been agriculture, oil and gas, and commuting to Calgary for jobs in the city.

Several businesses in the area derive a significant portion of their income from people travelling into the area, but few see "tourists" as a dependable part of their income. The main sources of tourism dollars are: **(a)** day travellers from Calgary on recreational excursions and **(b)** highway travellers coming through the area on their way to the major tourist destinations nearby. An increase in tourism to the area will require significant changes in attractions, services, attitudes and promotion. The categories used in this chapter have been adapted from Alberta Tourism's Community Tourism Action Program. The categories are succinct, fit the descriptive requirements of this chapter, and are commonly understood by communities and tourism operators.

4.1 Tourism Attractions

The majority of attractions in the area appeal mainly to local residents and day traffic from Calgary. There is a shortage of attractions that are targeted to appeal to tourists from beyond the traditional trade areas, with a few noteworthy exceptions: Spruce Meadows, Rafter Six, Maximum West Guest Ranch, and Kananaskis Guest Ranch have all established themselves with national and international visitors. Each of these exceptions has developed a highly targeted, activity-based approach (all four examples offer equestrian activities, related to the western ranchland theme).

Several events in the area have been successful in terms of attracting attendance, but it is likely that Calgary and the local trade areas are the origins of most participants. This pattern will likely continue: it will be difficult for events in this area to establish themselves beyond Calgary unless they are highly unique, or rely upon first-class facilities unavailable elsewhere (such as the tournaments at Spruce Meadows). The local towns may experience incremental growth by emphasizing the local culture more, and by tying their event to major events in Calgary.

Natural features in the area offer some potential to appeal to wider tourist markets, but the most appealing portion of most of these resources is already contained in Kananaskis Country. It is unlikely that there will be significant development of natural attractions in the study area. A more likely strategy is that tourism services in the area will adapt to cater to Kananaskis Country traffic (see 4.2 Tourism Services).

The development of attractions in the study area will require the initiators to create new opportunities that build from the culture, history and landscape of the area. The most obvious path to success is to develop specific activity-based opportunities and build around those opportunities (eg. equestrian activities, golfing, fishing, trail activities). The other potential opportunity is to create cultural opportunities that are perceived to be unique and exciting. This latter path is less likely to create true "destination" (overnight) use, and more likely to draw from the existing traffic through the area. The success of the latter strategy lies in the stimulation of incremental traffic through the area, and in creating reasons to spend "an extra day". We suspect that most overnight visitors will continue to see Calgary, Canmore and Banff as their lodging sites, but some operators will be able to attract overnight visitors because of unique accommodation opportunities.

4.2 Tourism Services

The majority of services in the study area are targetted towards the local trade area traffic. There is a shortage of facilities that appeal to recreational tourists. In most service centres, overnight accommodation is highly limited, or non-existent. This reflects the established market pattern of staying overnight in Calgary, Kananaskis or Canmore/Banff. However, there is a steady increase in the number of guest ranches and bed and breakfast opportunities in the area. The majority of successful accommodations have emphasized the western/ranchland theme, and have maintained a relatively small scale. It is expected that this trend will continue, and that reasonable growth of tourism services of this type can be anticipated and encouraged for the foreseeable future.

Despite the proximity of the area to the city of Calgary, there is a shortage of restaurants and lounges that project a sophisticated image to the tourists. Most establishments in the study area cater to local residents and businesses and provide "predictable fare" in institutional environments. There are some exceptions: McKay's Ice Cream in Cochrane has a legendary following, Black Diamond Hotel Tavern and Longview Bar have emphasized their ranch/cowboy origins and have established a strong word-of-mouth presence. As well, there are a few restaurants in Bragg Creek and High River which have developed an image that attracts clientele from beyond the normal trade area. However, for the most part, restaurants and lounges have not yet capitalized upon a potential tourist trade. It is expected that more sophisticated food/beverage outlets will begin to emerge if tourists become a larger and more consistent part of the local economy. In the meantime, several of the existing outlets should be encouraged to consider sophisticated marketing programs aimed at attracting tourists.

Retail services throughout the zone are generally not aimed at the tourist trade. However, there is an emerging supply of specialty retail goods in the area that will likely continue to grow. In Cochrane there are outlets for western art; in Bragg Creek, there is a specialized gift shop; in Longview, there is a sporting goods store (newly expanded).

It is likely that these kinds of services will continue to grow in the area. In particular, local crafts and arts outlets, sporting goods stores, and local food markets would be helpful additions to the tourism draw of the area.

4.3 Tourism Infrastructure

Given that the area is adjacent to Kananaskis Country, there has already been a significant investment in the tourism infrastructure of the region. For the most part, the area is well served by paved roads and municipal services, and public campgrounds and trails are available nearby. However, there are a few infrastructure investments that would support tourism growth in the area.

1.) Highway 22 is the main north-south access route and a potential scenic route for tourists. The lack of paving on this route south of Longview is a detriment to the use of the route as a scenic alternate, and to increased access to Kananaskis Country from the south. This highway also lacks scenic pull-offs and themed signs.

2.) Highway 1A, west of Cochrane, offers a high-quality scenic route to the mountains. It requires improved corners, bridge approaches and pull-offs, surfacing and shoulders to allow it to be promoted as a scenic highway.

3.) There is a shortage of pull-offs along Highway 22 where tourists can appreciate the scenery.

4.) There is a lack of signing along the main routes to describe the historic, cultural and geographic attributes of the area to touring motorists. This is a major use of the area, and distinctive interpretive signs would be an effective way to encourage greater exploration.

4.4 Tourism Marketing and Promotion

Ironically, the presence of Banff and Calgary adjacent to this zone has created a marketing problem. Most tourists have such a strong image of the mountains as a tourist resource, and of Calgary as a major service centre, that they look past the Foothills area. As a result, an enormous number of tourists pass through the Foothills area without stopping, or consciously acknowledging that the area deserves more exploration. The area could increase its profile through several improvements:

Firstly, a theme that enables tourists to "picture" the value of the area as a destination in its own right. The most obvious theme is the "western rangeland" theme: ranches, cowboys and open range. A majority of tourist services already incorporate this theme to some extent.

Secondly, services and attractions in the area should increase their effort to link promotions. The tourist should be encouraged to think of linked groups of events and services that merit overnight stays. This approach will emphasize the activities one can experience while in the area. Several Community Tourism Action Plans identified promotional linkages as a high priority.

Thirdly, improved promotion of Highway 22 and Highway 1A as scenic routes and recreation corridors would benefit Zone B and a major portion of Zone A. The use of themed signs, heritage/scenic pull-outs and promotional maps will create a significant increase in touring, assuming that road surface improvements are undertaken. This recommendation supports the "Trail of the Great Bear" concept.

Fourthly, the area must be able to create an increased market perception that there is "lots to see and do". The current tourist perception is that this is a pretty drive on the way to the mountains.

Fifthly, the area needs to improve its image as a place for good food, accommodation, and specialty, or custom goods. This will require more than promotion; it will require a major change in the emphasis of tourist services.

Most of these suggestions can be addressed through the "Team Tourism" program and have been cited in zone marketing plans for the Chinook, Calgary and David Thompson zones. The importance of a theme, and the potential for regional tours was strongly recognized by most communities in their Tourism Action Plans.

4.5 Tourism Attitudes, Awareness and Hospitality

There is a need to help business people in the area learn more about the specific tourist markets they can serve. Staff hospitality and service skills could be improved, with more emphasis upon preparation, consistency, service skills, customer relations skills and understanding of tourist needs and perceptions. Residents and business people would benefit from a greater awareness of the appeal of their area to tourists. Most of these concerns have been identified in local Community Tourism Action Plans, and several communities have outlined an action plan for improvement.

STRENGTHS	*LIMITATIONS*
• "Classic" ranch country	• Few major attractions
• Foothills and mountain scenery	• Inadequate and inconsistent services
• Excellent tourism access (for most parts)	• Lack of overall tourism image
• Rural lifestyle	• Lack of distinctive touring routes
• Outdoor recreational resources	• Poor town appearances
• Guest ranches	• Lack of signing and identification
• Proximity to Calgary	• Limited tourism awareness and hospitality skills
• Obvious historical elements throughout	• Lack of access to historical information/sites
• Unique services and giftshops	• Lack of specialized services for target markets
• Legendary characters (living and dead)	• Lack of co-ordination of events and promotion
• Sunny weather	
• Spruce Meadows	

CHAPTER • FIVE

ROLES OF PARTICIPATING SECTORS

Tourism is an industry that is highly market sensitive. It has expanded more rapidly than any other industry, and competition for tourist dollars therefore crosses international boundaries. Sites that establish themselves as tourism destination areas do so because all sectors work together in a cooperative fashion that allows these areas to respond to the tourist market in a responsive, innovative and effective manner. Although tourism is ultimately supported by the success of private sector businesses that cater to tourist needs, the public sector has played a large role in the development of tourism destinations in many countries of the world. The following section describes recommendations for effective tourism co-operation in the Foothills area.

5.1 Private Sector

The success of the tourism industry is ultimately dependent upon the skill and imagination of the entrepreneurs who offer goods and services to tourists. It is only through the sale of these goods and services that the area can capture new revenue from tourists. The private sector provides a number of tourism services in the Foothills area. These include accommodation, food services, recreation opportunities, retail services, highway and travel services.

1. *Accommodation*

In the Foothills area, entrepreneurs have begun to build a tourism industry through "cottage industry" initiatives. The development of guest ranches and bed and breakfast opportunities has attracted the interest of tourists from well beyond the local market area. In fact, a significant percentage of visitors to these sites have come from offshore. All of the large guest ranches are now actively planning or implementing new developments in the area. Demand for accommodation in the area will rise over the next several years, but only in specific accommodation categories (eg. bed and breakfast, guest ranch/ country inn, campground). The private sector is best positioned to respond to this demand.

2. *Food Services*

While there is no shortage of restaurants and food outlets in the Foothills area, there is a need for more food services that are targeted to tourist expectations and needs. Generally this will mean more emphasis upon theme (exterior and interior presentation), a greater variety of menus and specialty foods, and improved locations for tourist services.

3. *Recreation Opportunities*

Recreation opportunities are the strength of the Foothills area, and many entrepreneurs have responded. There are a large number of golf courses, along with a ski resort, several "adventure" recreation guides, and many hunting guides. There is still room for more operators in this area.

4. *Retail Services*

While basic retail services are well provided, there is a general shortage of specialty retail services. There is a need for more investment in developing themed retail outlets, and upon creating attractive outlets for crafts, souvenirs and recreation requirements.

5. *Highway and Travel Services*

The requirement for highway and travel services in the area is largely met. However, it is hoped that existing operators will assess considerations such as location, image and product range to meet tourist expectations.

6. *Hospitality Skills and Information Services*

The private sector should provide leadership in the development and delivery of hospitality skills and tourism information services. The provision of these two elements in any of the service businesses mentioned will directly contribute to the cash flow and profit potential of the business.

5.2 Provincial Government

The provincial government has provided leadership in the tourism industry. The development and change that is occurring in the tourism industry in the Foothills area has been accelerated by this initiative. However, the government cannot risk haphazard development of the tourism package, and must continue to be a supporter and investor in the industry if rapid tourism growth is to be stimulated. Areas where the government should continue to play a key role include the following:

1. *Planning and Community Involvement*

In the past, both communities and entrepreneurs have demonstrated a tendency to overlook planning and strategic evaluation as critical requirements for effective tourism development. This tendency to resist investments in planning may have been due to limited investment resources, or to a lack of understanding of the benefits of planning and community involvement. Despite a popular perception that planning delays action, recent experience indicates that the opposite is true. When the community has been effectively involved in the development planning process, the development cycle has been accelerated.

Many of the communities in the study area have undertaken Community Tourism Action Plans as a result of government support, and are now beginning to see initial tourism investments come forward. Most of the major generators proposed for the area have also drawn provincial support for business and marketing plans. This kind of support, especially where community involvement is encouraged, is invaluable and should be continued.

2. *Development of Attractions*

There is a need to create attractions in the area that capitalize upon regional heritage and character. These attractions have potential to support development of related tourism services.

Development priorities should focus on revenue generating facilities, attractions and services.

The creation of international calibre attractions will require significant capital investment which will be difficult to recover through revenues. Despite community support and business support, these attractions will only proceed if the government contributes a major financial investment. Since the government cannot contribute to every attraction in the province, there is an obvious need to establish priorities and an appropriate scale of investment.

3. *Promotion and Marketing*

The success of the tourism industry is heavily dependent upon effective market research, planning and promotion. Market behaviour must be constantly monitored and tourism operators must be highly responsive to changes in the market place. The development of a strong "image" has a significant effect upon the numbers of visitors attracted to an area.

Throughout the world, governments have become involved in the provision of market research, planning support, and promotion. In an internationally competitive business, it is a requisite that the operators of a given area share their data and strategies, and that they reinforce a specific marketing position in order to be successful. The government has played an important co-ordination role in this process, and has made catalytic investments in tourism marketing through Team Tourism and through support funding for tourism business marketing plans. This role is critical to the development of the Foothills area and should be continued.

4. *Infrastructure Improvements*

There are two major improvements to infrastructure that the provincial government is best able to deliver. The first is the development of "scenic routes" in the area, and the second is the development of appropriate signs and pull-offs along these routes. Section 4.3 describes these needs in greater detail.

5.3 Not-For-Profit Sector

The not-for-profit sector has played an important role in the development of tourism attractions in Alberta (eg. Heritage Park, Calgary Zoo, Glenbow Museum). This role is also needed in the Foothills area, and fortunately there are already proposals for major attractions in the area by not-for-profit organizations.

Not-for-profit societies have been, and will continue to be, leaders in the development of tourism attractions. It will be important that they work closely with the communities they serve, in order to maximize benefits and avoid conflicts. The societies will also have to attract corporate involvement and sponsorship to accumulate necessary capital and operating dollars.

It is of utmost importance that the not-for-profit societies plan to operate their proposed attractions in a highly business-like manner. The reliance of major attractions on visitor expenditures require that they be operated with great emphasis upon quality products, customer service and customer relations.

5.4 Local Government Sector

Local governments (eg. municipality/county/municipal district) can play a major role in the development of the tourism industry. The communities in the study area have taken the vital first step to their involvement through the completion of Community Tourism Action Plans. These plans outline many actions that the communities can undertake including improving community appearance, developing themes and promotion, co-ordinating local tourism initiatives and promotions, supporting local hospitality and awareness training, and improving orientation signs and information support for tourists. Some of the initiatives that will have a critical impact on regional tourism development are described in more detail below.

1. *Planning/Policy*

Local governments should make an effort to bring tourism requirements into planning and policy decisions that affect land use and development.

2. *Zoning and By-Laws*

Zoning and by-laws should be reviewed to ensure that no unnecessary barriers are created that interfere with the proper location and promotion of tourist-oriented businesses. Likewise, they should provide appropriate controls and monitoring to ensure that prominent tourist service areas are not unsightly.

3. *Community Appearance*

Tourists will be much more attracted to communities that display character and continuity. Businesses and public buildings can be encouraged to follow thematic design guidelines along tourist service areas, and adjacent to major attractions.

4. *Directional Signs*

Improved directional signs will help tourists find their way. All of the communities in the area could improve the way that tourists are welcomed and oriented.

5. *Support for Tourism Developments*

The tourism industry will require support initially. Municipalities can help by providing co-operation and planning support, by co-ordinating community marketing and promotion programs, by improving community presentation (image and publicity), and by financially helping where necessary during the formative years of new attractions that will have long term community benefits.

CHAPTER • SIX

TOURISM INITIATIVES BY INDIAN TRIBES

6.1 Background

This chapter has been prepared based on a review of Community Tourism Action Plans (CTAP), describing the T'suu T'ina (Sarcee) Nation, and three bands of the Stoney Tribe; the Goodstoney Band, the Chief Jacob Bearspaw Band, and the Chiniki Band. Members of the study team also collected information at a meeting sponsored by representatives of the Goodstoney Band with participation by representatives of the T'suu T'ina Nation, and the Eden Valley, the Chiniki, the Goodstoney and the Chief Jacob Bearspaw Bands. The names of the meeting participants are included in Appendix 3.

All of the bands in the study region have identified tourism as a potentially important economic development opportunity. They also recognize their strategic location in the Bow Valley Corridor as an asset to attracting tourism traffic from Highways 1, 1A, 40 and 22. There is recognition that the presentation of the Indian culture and traditions has the potential to capture interest and extend the visits of tourists travelling into the region from national and international destinations. Individual bands also recognize that tourism services are lacking in the region and are assessing the opportunities to provide services to a variety of tourism markets. The following notes describe tourism initiative currently envisioned on each reserve.

6.2 The Stoney Tribe

1. Goodstoney Band

The Goodstoney Band Reserve is approximately 100 kilometres west of Calgary on Highway 1A. The Band has been developing an accommodation centre called Nakoda Lodge since the early 1970s. It was originally conceived as an institute to promote Indian education, learning, culture and religion so that native traditions and values could be preserved and passed to new generations.

The band proposes to include a museum, an art centre and an interpretive centre in the Nakoda Lodge development. While there is no specific schedule for the completion of the overall development, a 50 room hotel was recently added to the nine year old Nakoda Lodge meeting and dining facility. The band has also prepared a proposal for an adventure tourism package tied in with the lodge. A remote overnight camp was constructed during 1989 to support this initiative. Horse/pack tours will be staged from Nakoda Lodge to remote areas of the reserve for varying lengths of overnight stays.

The band currently operates the Stoney Indian Park Campground and has prepared a proposal for its physical and service expansion.

A proposal is under consideration to develop significant historical sites along Highway 1A, adjacent to the Goodstoney Band lands. The concept proposes that starting at the eastern boundary, where the highway meets the Goodstoney lands, that man-made and natural features be presented through a self-guided interpretive program for the touring public. Historic features of significance include McDougall Memorial Church, buildings within the Morley Settlement, "Old Bow Fort" (an early Hudson Bay post), the Stoney Wilderness Centre, and the Nakoda Institute and Lodge.

2. *Chiniki Band*

The Chiniki Band Reserve is located immediately south of the Goodstoney lands along the Trans-Canada Highway. The band currently operates the Chief Chiniki Service Centre adjacent to the Trans-Canada Highway. It has recently completed a market and service assessment for the restaurant located within the complex. The band has developed a promotional package to directly market their crafts and foodservices to tour operators. This promotion will be undertaken during February and March of 1990. Last summer, the restaurant and craft store serviced 12 to 15 tour buses per month. The band has also done some preliminary investigation into the establishment of a native interpretive centre aimed at attracting the enroute traffic from the Trans-Canada Highway. There are no firm plans to undertake an interpretive centre development at this time.

3. *Chief Jacob Bearspaw Band*

The Chief Jacob Bearspaw Band is at the western end of the Stoney Tribe lands, south of the Trans-Canada Highway. The Chief Jacob Bearspaw Band is embarking on new tourism development initiatives as a result of undertaking and completing its Community Tourism Action Plan. The band is proposing to establish a native craft manufacturing and retail outlet, develop a campground along the Kananaskis River, make the Band's buffalo herd more accessible to tourists, organize a summer Pow-Wow, and explore the feasibility of providing a facility and program to interpret the Stoney Tribe history and culture. The band has also identified pursuing co-operative tourism developments with the Chiniki Band adjacent to Chiniki Lake as an important tourism objective.

Another Jacob Bearspaw Band community, the Eden Valley Reserve, includes two land areas within the study region; one is located south of Longview on Highway 22, while the other is located on Highway 541, with its western boundary at the junctions of Highways 40 and 541. While there are no specific plans for tourism developments by the Eden Valley Band, their representatives are anticipating opportunities to cater to the touring market on Highway 22 as the region becomes better known to tourists. Should the proposed Hell's Half Acre Interpretive Centre proceed, band members foresee a significant increase in tourism to the southwestern part of the study region from which tourism development opportunities will be generated.

6.3 The T'suu T'ina Nation (Sarcee)

The T'suu T'ina Nation is located on the western boundary of the city of Calgary and extends west to the Bragg Creek vicinity. Representatives indicated that they are actively pursuing tourism opportunities. They have successfully established the Redwood Meadows Golf Course near Bragg Creek. There is an active tourism committee in the community that is currently encouraging the development of Indian cultural programs that are aimed at educating non-natives in native culture, values and traditions. They have proposed the development of a visitor centre/interpretive/museum complex on the reserve. The T'suu T'ina Nation is also looking at establishing a dinner theatre providing authentic native presentations by native performing arts groups (eg. Red Thunder Dance Group, Bull Head Youth Group, Broken Knife Dance Troupe, Shining Star Society).

The band sees an opportunity to expand the current participation from the Calgary market by continuing to support small business in the provision of tourism services. For example, the Indian people privately operating trail riding and riding stable ventures in the Bragg Creek area are meeting with success. The T'suu T'ina Nation is also reviewing the possibility of constructing golf courses, fully serviced recreational vehicle parks and a visitor orientation centre. The concept of providing these services through facility clustering (eg. Family Vacation Destination Resort) is supported by the tourism committee.

6.4 Approach and Philosophy

Representatives of bands within the study region agreed that the most important tourism development objective is to present unique tourism opportunities, based on the native culture and providing complementary supportive services, on Indian band owned land. In order for any tourism products to succeed, based on the native culture, the products must be authentic and presented by native people. The Indian band representatives also stressed the importance of generating economic and social benefits directly to band members as a result of tourism development.

6.5 Barriers to Indian Bands Tourism Initiatives

Four important barriers were identified as being limiting to the development and presentation of tourism products by Indian bands within the study region.

1. *A Lack of Investment Capital*

Indian representatives discussed the magnitude of capital investment required to create major tourism developments (eg. golf course development at $2.5 - 3.5 million) and the inability of Indian bands to access the required funding.

2. *A Lack of Trained Staff*

Some band representatives reflected that social and employment barriers are still major factors within their communities. Training needs for all vocations areas are high. Trained tourism management and staff resources are not readily available within most of the native communities.

3. *A Lack of Co-operative Approaches to Tourism Development*

While each group indicated that its councils had an interest in developing tourism initiatives and each respected the other's right to do so, there has been little active support for co-operative efforts. For example, each band still has its own "dream of an interpretive centre", but as a group the Treaty 7 nations are not actively co-operating to develop a co-ordinated program or a joint venture interpretive facility within the region.

4. *A Lack of Tourism Marketing*

While all bands recognize the opportunity to capture segments of the tourism markets by presenting authentic Indian culture, there does not appear to be a concerted effort by any of the bands to market their products or services. Some of the bands (eg. Goodstoney and the T'suu T'ina Nation) have indicated that they are assessing the tourism markets in order to develop tourism marketing strategies.

6.6 Observations

The recognition of Indian representatives and leaders that tourism deserves a high priority as a source of economic development is encouraging. There is also a well-founded belief that tourism development should be undertaken on reserve lands, emphasizing authentic Indian participants, rituals and crafts. These beliefs indicate an opportunity to create a significant tourism benefit.

However, the Indian reserves are affected by the same territorial limitations that affect communities throughout Alberta. There is a significant risk that resources will be placed in a number of individual tourism developments, none of which will have sufficient scale to attract international visitors. This would be unfortunate since the Indian culture is likely to have strong international appeal.

It would be highly desirable if the Indian cultural groups could co-ordinate their resources and efforts to support a large scale tourism generator that would benefit all of the participating Indian communities. If such co-ordination emerges, the Bow Valley Corridor will present a highly desirable location for the development because it offers the pre-requisite mountain scenery, and is convenient to the existing flow of international travellers.

Other native interpretive/tourism centres have been proposed and assessed in other parts of Alberta. Most notably is the "Blackfoot Crossing" centre (Gleichen area) and the Woodland Cree Interpretive Centre at Grouard. It is difficult to analyze the potential competitive impact of these developments on the opportunities identified here, since no major facility or program investments have been made elsewhere in the province.

CHAPTER • SEVEN

MAJOR TOURISM GENERATORS

The four potential major tourism generators reviewed here are all attractions that could be of sufficient scale to attract significant numbers of new visitors from beyond the regional market area (see Figure 4). While these generators could create substantial regional economic stimulation, they would be expensive to build and all would require some level of public funding at the outset. In all cases, these generators have been proposed to be managed and operated by non-profit organizations. All of the potential generators are based upon "interpretive centre" concepts, and all include a sufficiently large site to allow visitors to explore an outdoor as well as an indoor setting.

The projection of market demand that follows is based upon an analysis of the geographic and household segments described in Chapter Three. The estimate of the visitation response of each geographic segment was based upon (a) the current response to attractions in the region, and (b) the attractiveness of the proposed generator (based upon focus groups and analysis of comparables). The response rate of household and travel purpose segments was based upon (i) focus group responses, (ii) analysis of comparables, (iii) regional experience, and (iv) an assessment of potential awareness, response and return rates (see illustration below).

PROJECTED PROVINCIAL MARKET REACTION TO GENERATOR PROPOSALS

(This chart describes the projected relative level of awareness, response, and return visits each proposed facility is expected to generate among provincial residents. Facilities will be more effective when they can raise these levels through promotional or service strategies.)

Proposed Facility	Awareness of Facility	Response Rate	Return Visits
• Bar-U	Low*	Low*	Moderate
• Hell's Half Acre	Moderate	Moderate	Low
• Western Heritage Centre	High	Moderate	Moderate
• Native Interpretive Centre	High	Moderate**	Moderate

**This will rise if the site is designated as a national historic site.*

***Response will be highly sensitive to the image portrayed.*

Source: Equus Consulting Group

The focus group responses are based on two sessions in the Edmonton area, with a small number of adult participants, each of whom had vacationed with children in a motor vehicle in the last year (see Appendix 1).

Community Tourism Action Plans supplied by Alberta Tourism, and reviewed as part of this study are consistent in their action plan priorities with the proposed generators (see Appendix 4).

Economic impact has been calculated based on estimates for capital and operating costs and revenues for each one of the tourism generators. Economic multipliers, sourced from Economic Multipliers for Alberta Industries and Commodities - 1987, have been applied to the estimated figures. All multipliers used account for "economic leakage" from the region and province.

7.1 Alberta Ranch National Historic Site (Bar-U)

Description

The proposed development is based upon the restoration of a significant historic ranch, in order to illustrate the lifestyles, architecture, social and environmental context of the 1890s. The proposal is unique in that it places a historic interpretive ranch immediately adjacent to a modern working ranch. Visitors would also have an opportunity to explore 60 acres of scenic grounds offering picnic and wildlife observation opportunities. The proposal includes an interpretive centre, a ranch site restoration, on-site interpretive media, fencing, trails and picnic areas. The location is 15 kilometres south of Longview, off Highway 22 (see Figure 5). The proposal has been submitted to the Federal Minister of the Environment for consideration as a National Historic Park. A concept plan was not yet available when this report was prepared.

Rationale

1. The need to preserve a historic ranch: The remaining examples are rapidly deteriorating.
2. Attractiveness to tourists: Builds on the romance of the ranching theme, and the beauty of the site.
3. Superior site: Both government (Canadian Parks Service, Culture and Multiculturalism) and non-profit sector assessed potential sites and selected the Bar-U as the preferred site.
4. Willingness of owner to sell: Aging owner will sell now. If this opportunity is missed, then descendants may not sell.

Potential Barriers

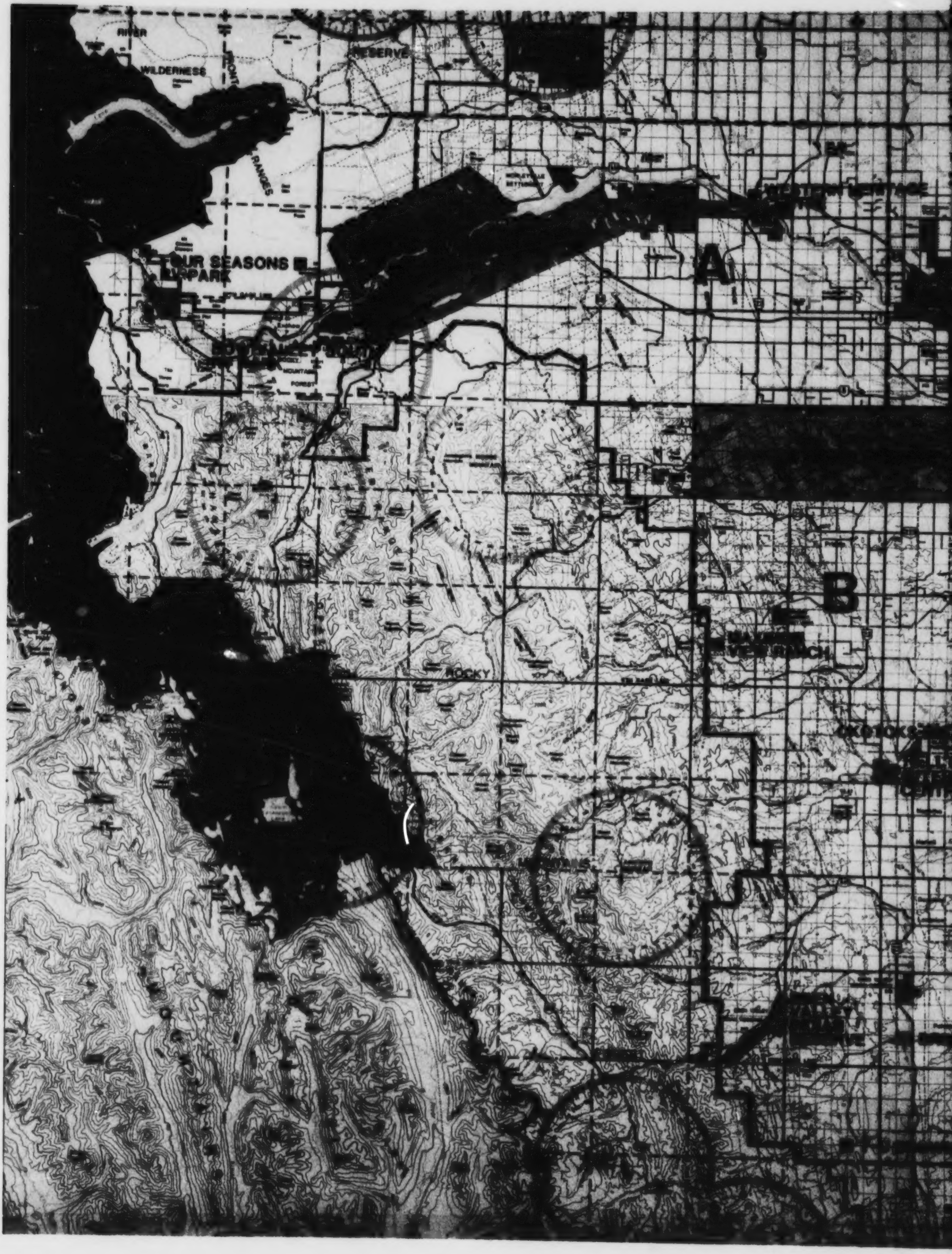
1. Land acquisition may be inordinately expensive. It appears that delays in acquisition may create opposition from the family that owns the site.
2. Stabilization/restoration costs are not yet estimated, but there is considerable work required.
3. Barriers: Owner has yet to formally agree to a reasonable sale price. No municipal approvals have been granted. Federal participation has not been confirmed.

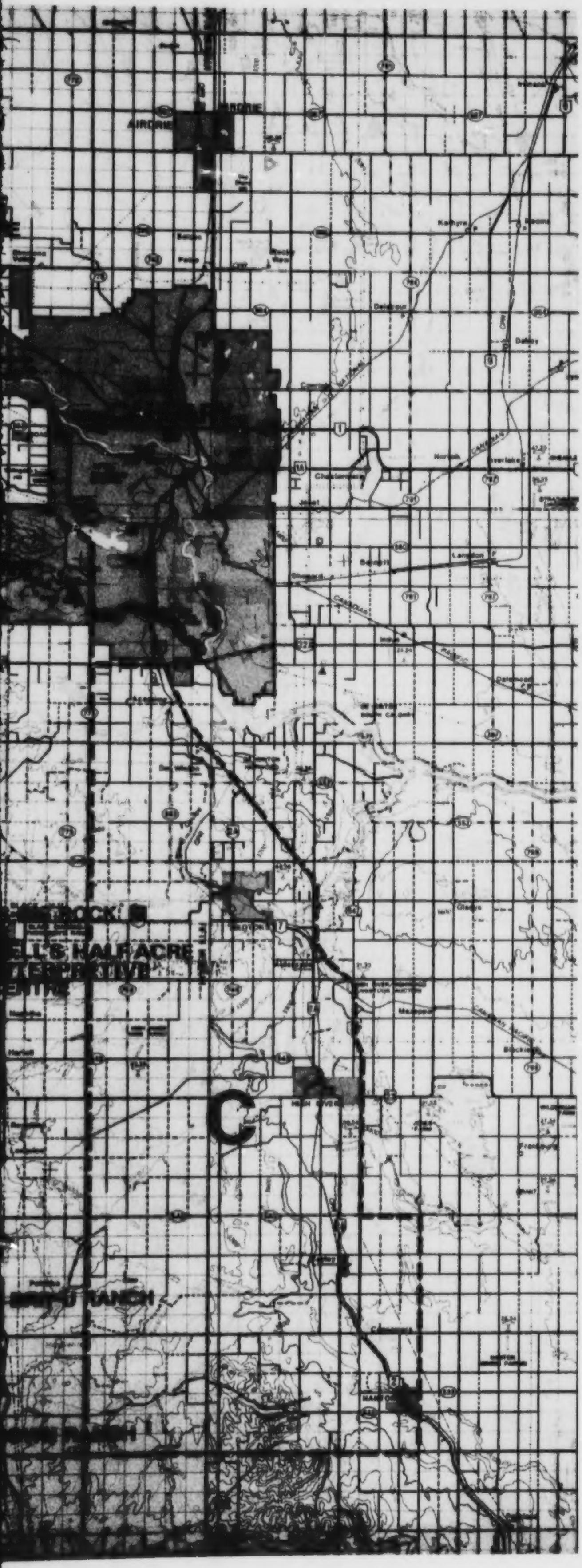
Strengths

1. Best site of its kind in Alberta.
2. Scenic valley setting.
3. Adjacent to a working ranch.
4. Attractive theme.
5. Adjacent grounds.
6. Paved access nearby.
7. Food services onsite.

Weaknesses

1. Location: Site is 44 kilometres from Highway 22 (paved access).
2. No onsite accommodation (reduces national/international appeal).
3. Nearest services are limited, and 15 kms. away.


RIVER
WILDERNESS
FRONT
RANGES
RESERVE
FOUR SEASONS
PARK
HERITAGE
A
MOUNTAIN
FOREST
ROCKY
B
VIEW RANCH
OKOTOKS


AIRDRIE
ROCK
ELL'S HALF ACRE
TERPRETIVE
ENTRE
C
RANCH
Langdon

LEGEND

- - - - STUDY BOUNDARY

▪ PROPOSED DEVELOPMENTS

▲ PROPOSED NATIVE INTERPRETIVE CENTRE DEVELOPMENT

POTENTIAL TOURISM DEVELOPMENTS

FOOTHILLS TOURISM DESTINATION RESORT PLAN

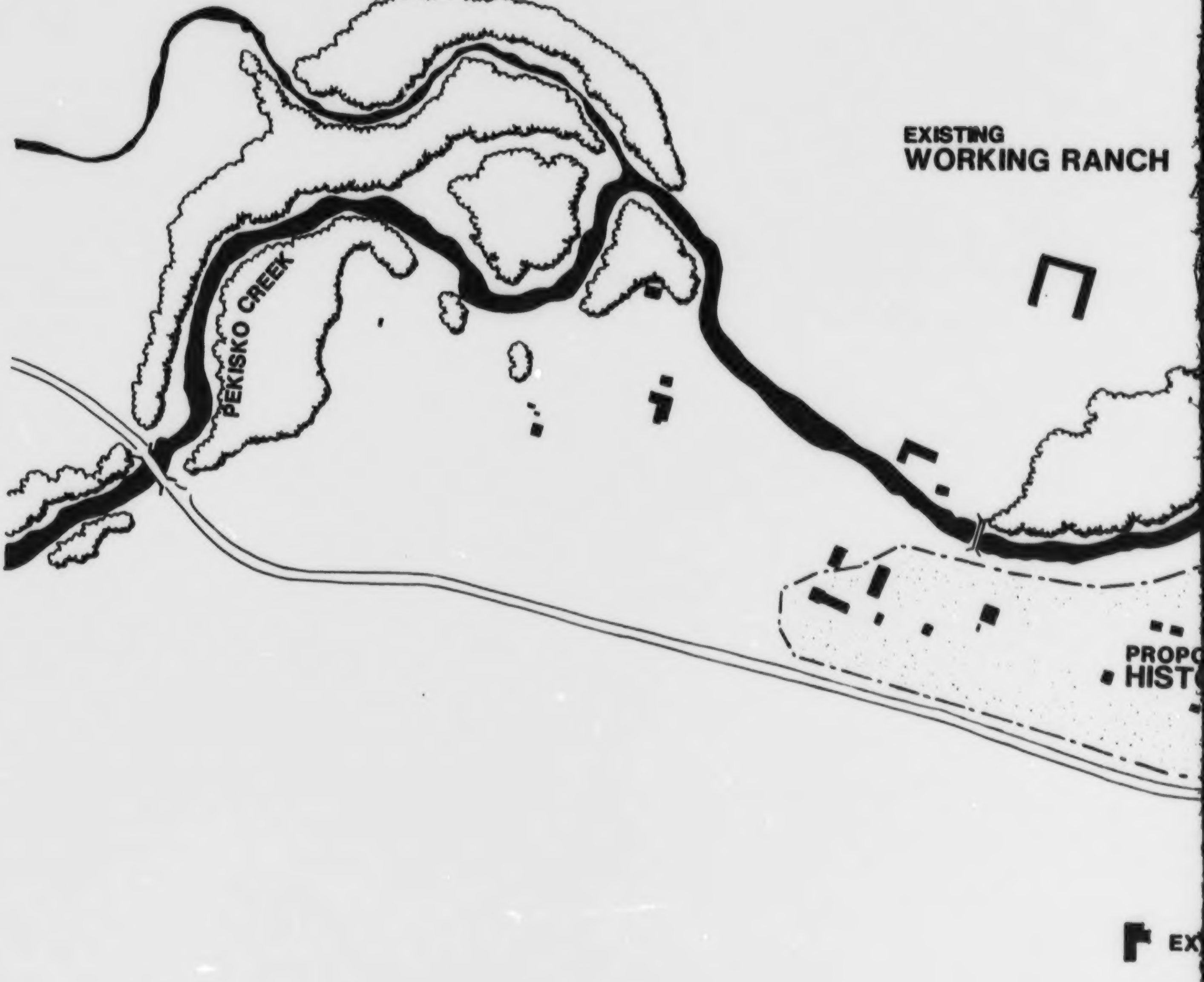
NORTH

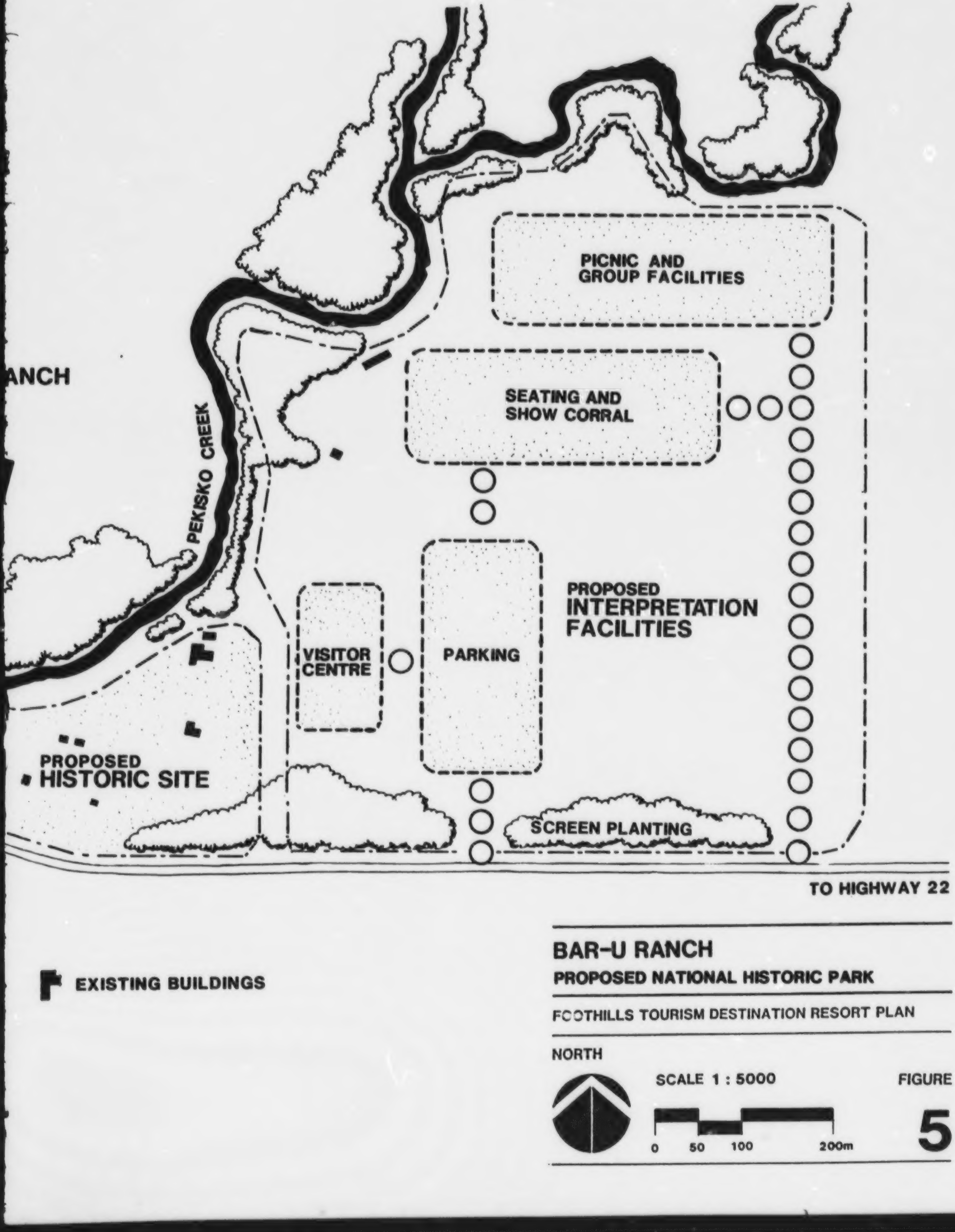
SCALE 1 : 250 000

0 5km 10km 20km

FIGURE

4


EXISTING
WORKING RANCH
PEKISKO CREEK
PROPO
HIST
EX


PICNIC AND GROUP FACILITIES
ANCH
SEATING AND SHOW CORRAL
PEKISKO CREEK
PROPOSED INTERPRETATION FACILITIES
VISITOR CENTRE
PARKING
PROPOSED HISTORIC SITE
SCREEN PLANTING
TO HIGHWAY 22
EXISTING BUILDINGS
NORTH
SCALE 1 : 5000
0
50
100
200m

BAR-U RANCH

PROPOSED NATIONAL HISTORIC PARK

FOOTHILLS TOURISM DESTINATION RESORT PLAN

FIGURE

5

4. Opportunity for day trip tie-ins are limited.
5. Limited onsite capacity.
6. Operating season will likely be limited to 150 days.

Anticipated Markets and Visitation

It is premature to predict markets and visitation accurately. However, the following hypothetical prediction is provided for comparative purposes:

Where Will Site Draw From?

- Local Markets: 60%
- Enroute: 10%
- Western Canada: 20%
- North America: 7%
- Offshore: 3%

Who Will the Site Draw (in Year Three)?

- Families: 28 000
- Mature: 8 400
- Singles/Couples: 8 400
- Corporate/Convention: 3 200
- Special Interest Groups: 12 000

- Predicted Total Annual Visitation: 60 000

Observations

The site has strong merits as the best of a disappearing resource that has tremendous historical importance. Its merits as a major tourism generator are less strong. In order to create a major tourism draw, this site should be accompanied by complementary development of accommodation and services in the area. If the site is to be managed primarily as a tourism generator, it should be managed as a historic park, and promotions should emphasize excellent scenery, and a park-like experience.

The limited capacity of the site and the limited extent of the resources suggest that the development scale should be lowered, and that the emphasis should be placed more strongly upon protection and management, with less emphasis upon onsite programming.

The relationship to the working ranch will require advance planning and co-operation with the ranch owner. Unless the ranch owners are prepared to cater to tourists, conflicts will arise onsite. On the other hand, the development of guest ranch capacity on the working ranch would strengthen both operations.

Opportunities for Related Community/Private Sector Services

Given that the site is in a remote rural area, there is little opportunity on adjacent lands for private sector developments. However, there is potential for a private operator to provide food and gift store services onsite, and there is also potential for the working ranch next door to provide guest ranch accommodations and services. The development of this site would have a favourable impact upon all towns in the vicinity; obvious increases in traffic and interest would be seen in Longview, Nanton and High River. All three towns have expressed interest in building the ranch into their promotions. The main private sector opportunities in these towns would be related to providing western theme meals, legendary cowboy bars, highway services (gas, fast food, groceries), and souvenirs (area crafts and gifts). It would be highly desirable to provide western theme accommodations as close as possible to the site. The viability of these accommodations will be highly dependent upon attracting off-season demand through winter and shoulder season events and activities.

FINANCIAL PROJECTIONS (YEAR 3)

Projected Visitation: 60 000

Income:

• Gate:	$180 000
• Food:	$111 000
• Store:	$132 000
Total Income:	**$423 000**

Expenses:

• Salaries/Wages/Benefits:	$382 200
• Maintenance:	$63 000
• Exhibits:	$73 000
• Cost of Goods Sold:	$110 300
• Overhead:	$175 000
• Contingency:	$40 000
Total Expenses:	**$843 500**
Operating Surplus (Deficit):	*($420 500)*

This projection is for comparative purposes only and does not reflect any existing commitments on behalf of either government or proponents. These projected attendance figures are expected to increase if the ranch becomes a national historic site.

BAR-U RANCH ECONOMIC IMPACTS

	Regional	Provincial	Jobs
• Construction Impact	$5 109 800	*	125
• Operations Impact	$927 850	*	28
• (Indirect) Visitor Spending Impact	$1 180 000	*	7
• Provincial Income Taxes - Construction	*	$419 800	*
• Annual Corporate Taxes - Operations	*	$11 500	*
• Annual Taxes on Visitor Expenditures	*	$58 800	*

Source: Equus Consulting Group

7. Hell's Half Acre Interpretive Centre

Description

The proposed site is the former Western Decalta Gas Plant, located between Turner Valley and Black Diamond (see Figure 6). The development of this site is envisioned on a grand scale, including a 50 000 square foot interpretation centre housing 25 000 square feet of display space, eight restorations of historic facilities, a monorail, extensive interpretive media, and trail systems. The centre would incorporate high technology exhibit techniques, and a "first hand" approach to interpretation.

Realizing that development of the complete proposed facility will take some time, the Turner Valley Oilfield Society has suggested that a review of a "phase one" development that is about one third of the final development. It is assumed that this will include much of the interpretation centre, supported by trails through the site and onsite interpretive media.

Rationale

1. Would provide a unique opportunity to experience a real petroleum industry site.
2. Would provide an educational experience not yet available in Alberta. Would address a serious lack of public information about Alberta's largest single industry.
3. Would take advantage of a major industrial site that has been recently acquired by the Alberta government. Failure to stabilize and restore the site will likely mean that this sort of development would be impossible in the future.
4. Would be the anchor of a tourism industry in the Black Diamond/Turner Valley area, which has suffered recently from oil and gas industry cutbacks.

Potential Barriers

1. Land acquisition and reclamation: The land has already largely been acquired by the Alberta government, for a nominal cost (final legal arrangements for transfer were being completed as this report was being prepared). However, the site requires significant reclamation from oil and chemical spills, and the cost (broadly estimated at $3.5 million) would likely be borne by the provincial government.
2. Stabilization/restoration would include fencing, lighting, relocations, and restorations. This could cost as much as $3 000 000.
3. Barriers: The cleanup of the site is not yet resolved. As well, the sources of funding are not yet resolved. While several parties have shown interest in contributing financially, none have yet contributed. Provincial government support is not yet confirmed.

Strengths

1. Unique oil/gas industry site.
2. Valuable educational experience for Albertans.
3. Interpretive media will be an attraction in themselves.
4. Significant range of 20th century history available at one location: 1912 to 1960. Sole surviving major symbol of the Turner Valley Oil and Gas Field.
5. Interesting location, adjacent to Kananaskis Country.
6. Located near population of 720 000.

Weaknesses

1. Tourism services in area are undeveloped.
2. Theme does not have international appeal.
3. No onsite food or accommodation services.
4. Low enroute traffic levels near site.
5. Must overcome public aversion to gas processing facilities.
6. Does not capitalize upon public desire for scenery and natural areas.
7. Is not a well-known landmark outside of Calgary region.

Anticipated Markets and Visitation

These figures are projected from the site plan created in 1986, but assume phase one construction only (eg. no monorail or extensive reconstructions).

Where Will the Site Draw From?

• Local Markets:	78%
• Enroute:	8%
• Western Canada:	7%
• North America:	5%
• Offshore:	2%

Who Will the Site Draw (in Year Three)?

• Families:	80 000
• Mature:	10 500
• Singles/Couples:	14 000
• Corporate/Convention:	22 500
• Tours/Special Interest:	22 500
• Predicted Total Annual Visitation:	149 500

Observations

The Turner Valley proposal offers a unique educational opportunity to visitors and recycles an aging gas plant in a highly creative manner. However, market research should be undertaken to ensure that this centre will be attractive to tourists.

The proposed centre will appeal primarily because it offers an opportunity to experience something different. The unique "industrial park" environment and the high technology presentations proposed will certainly appeal to visitors. These factors are often not dominant factors in market choices, however, and the centre may be vulnerable to other market perceptions about scenery, returning to nature, things to see and do in the area, the opportunities to explore nearby towns, and opportunities to experience good food. The proposal could be more accurately evaluated if the market response to perceptions were measured.

Opportunities for Related Community/Private Sector Services

The development of this centre would create an obvious increase in demand for tourist services in Black Diamond and Turner Valley. It is likely that this centre will increase the demand for overnight camping in the area, possibly to the extent that development of a private sector campground will be worthwhile. The development will also benefit nearby bed and breakfast accommodations, and guest ranches. Demand for a motel in the area may result, although the seasonal nature of the traffic will require close scrutiny of feasibility. Demand for services in Black Diamond and Turner Valley will increase significantly, but these services will have to improve if this demand is to be captured. The services most likely to be affected are restaurants, specialty retail, and highway services (gas, fast food and groceries). Currently, these services are not oriented to tourists, and significant changes would be required to meet tourist expectations.

FINANCIAL PROJECTIONS (YEAR 3)

Projected Visitation: 149 500

These figures estimate phase one costs and benefits for the purpose of this report.

Income:

• Gate:	$450 000*
• Donations/ Endowments:	$300 000
• Food:	$277 500
• Store:	$330 000
Total Income:	**$1 357 500**

(*Note: If this facility is operated by Alberta Culture and Multiculturalism, donations will be accepted rather than mandatory gate fees charged.)

Expenses:

• Salaries/Wages/Benefits:	$546 800
• Maintenance:	$90 000
• Exhibits:	$250 000
• Cost of Goods Sold:	$275 850
• Overhead:	$335 000
• Contingency:	$65 000
Total Expenses:	**$1 562 650**

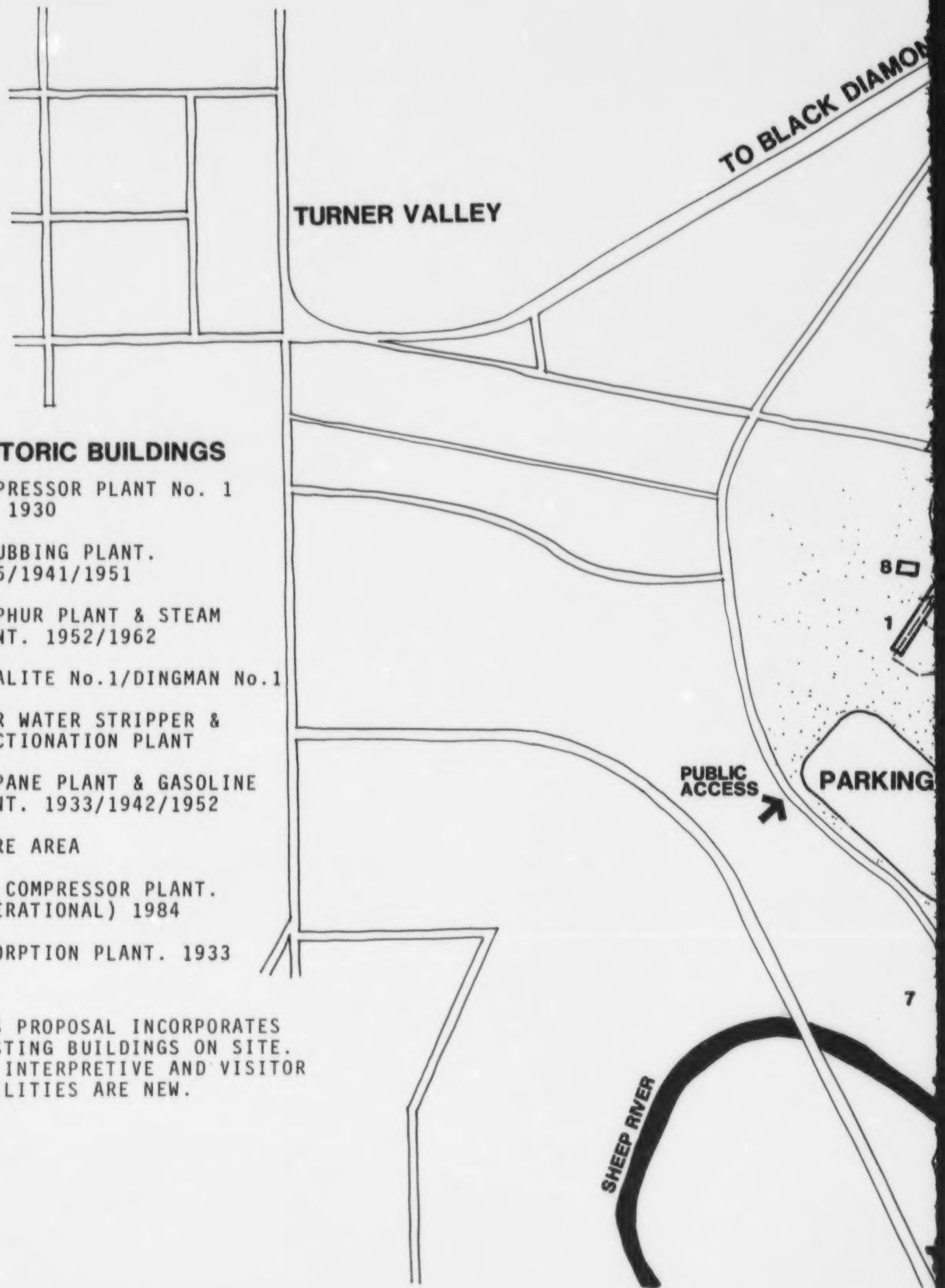
Operating Surplus (Deficit): ($205 150)

This projection is for comparative purposes only and does not reflect any existing commitments on behalf of either government or proponents.

HELL'S HALF ACRE ECONOMIC IMPACTS

	Regional	Provincial	Jobs
• Construction Impact	$7 312 000	*	179
• Operations Impact	$1 719 000	*	51
• (Indirect) Visitor Spending Impact	$2 940 000	*	18
• Provincial Income Taxes - Construction	*	$600 300	*
• Annual Corporate Taxes - Operations	*	$22 600	*
• Annual Taxes on Visitor Expenditures	*	$116 000	*

Source: Equus Consulting Group


TO BLACK DIAMON
TURNER VALLEY
8
1
PUBLIC ACCESS
PARKING
7
SHEEP RIVER

HISTORIC BUILDINGS

1 COMPRESSOR PLANT No. 1
ca. 1930

2 SCRUBBING PLANT.
1935/1941/1951

3 SULPHUR PLANT & STEAM
PLANT. 1952/1962

4 ROYALITE No.1/DINGMAN No.1

5 SOUR WATER STRIPPER &
FRACTIONATION PLANT

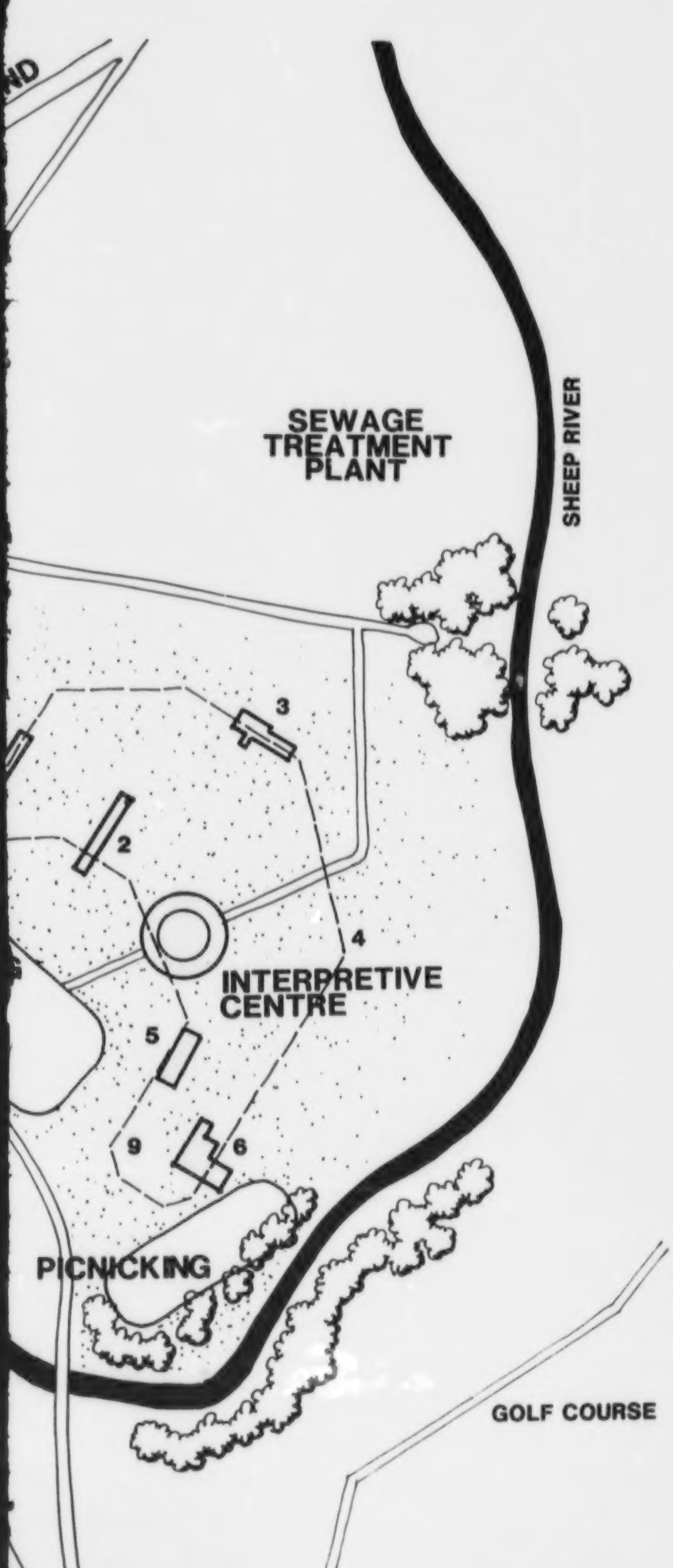
6 PROPANE PLANT & GASOLINE
PLANT. 1933/1942/1952

7 FLARE AREA

8 NEW COMPRESSOR PLANT.
(OPERATIONAL) 1984

9 ABSORPTION PLANT. 1933

THIS PROPOSAL INCORPORATES EXISTING BUILDINGS ON SITE. ALL INTERPRETIVE AND VISITOR FACILITIES ARE NEW.


ND
SEWAGE TREATMENT PLANT
SHEEP RIVER
3
2
4
INTERPRETIVE CENTRE
5
9
6
PICNICKING
GOLF COURSE

HELL'S HALF ACRE INTERPRETIVE CENTRE

FOOTHILLS TOURISM DESTINATION RESORT PLAN

NORTH

SCALE 1 : 4000

0 50 100m

FIGURE

6

7.3 Native Interpretive Centre

Description

The proposed development is based upon a replication of native lodging and ritual sites in a natural setting. The visitor would experience native life and rituals, as well as having the opportunity to see displays of native artworks, clothing and history. The delivery of the experiences onsite would include scheduled demonstrations of native dances and re-enactments of rituals and stories.

Because the culture of the southern Alberta tribes is oral, the experience would be based upon dramatic presentations and re-enactments. The visitor would also have an opportunity to eat foods that are modern adaptations of some of the staples of the native diet. They would also be able to purchase unique high quality souvenirs, artwork and clothing.

This centre could be located in several areas in the Bow Valley, however a site between Morley and Seebe is assumed for this study analysis.

Rationale

1. Attractiveness to tourists: The Plains tribe culture has high appeal to tourists. It fulfills a romantic image of a "pure" and colourful lifestyle.
2. Strategic location: There is a need for a major attraction in the Bow Valley that can stop traffic west of Calgary. High volumes of tourist traffic pass by without stopping.
3. High quality location: The potential location is highly scenic, and fulfills the need for a worthwhile tourist stop.
4. Cultural preservation: The development would play an important role in the preservation of the oral culture and artworks of the native peoples.
5. Educational: the site would educate both whites and natives about the native culture, and would contribute to pride and racial tolerance.

Potential Barriers

The proposed development is not yet fully described. The description here is therefore speculative. The description here relates only to a potential first phase estimated at $10 000 000.

1. Land acquisition: Lands have not yet been acquired. They could come from provincial donation or lease of crown land, or from lands donated from the nearby Stony reserves.
2. Planning, design and co-ordination: The planning and design would be highly complicated, since a number of cultures could be represented, and a significant amount of research and co-ordination would be required to enable development.
3. Barriers: There are significant barriers to be overcome. The greatest of these is to get consensus and participation from the native tribes to be represented. As well, a suitable development site has yet to be donated. Thirdly, the sources of potential funding are not yet clarified, although major industrial sponsors have apparently expressed interest in the concept.

Strengths

1. High profile theme will capture international attention.
2. Superb scenery; valley and mountains.
3. High traffic location; close to a market of 720 000.
4. Excellent access.
5. Food services onsite.
6. Thematic accommodation available nearby.
7. Easily tied into tours and touring holidays.
8. Attractive to both day and destination tourists.

Weaknesses

1. Concept is under discussion and planning by native proponents to obtain support.
2. Off-season draw may be limited.
3. Concept is not yet clearly outlined.
4. Difficult to co-ordinate required level of live presentations.
5. Site not yet secured.

Anticipated Markets and Visitation

It is premature to predict markets and visitation accurately. The following is a hypothetical projection of the site's potential.

Where Will the Site Draw From?

• Local Markets:	40%
• Enroute:	25%
• Western Canada:	10%
• North America:	15%
• Offshore:	10%

Who Will the Site Draw (in Year Three)?

• Families:	105 000
• Mature:	33 000
• Singles/Couples:	65 000
• Corporate/Convention:	7 000
• Tours/Special Interest:	37 500
• Predicted Total Annual Visitation:	247 500

Observations

The native interpretive centre would be a powerful generator if it could be delivered as described with high involvement from the native peoples, and a high level of live re-enactments and art/craft/culture displays. It will be a significant challenge to pull this concept together and make it successful. However, the rewards to the region and to the image of the province would also be substantial.

This development should be started on a lower scale, as a seasonal attraction. The emphasis should be placed upon live demonstrations, retail sales, and display and protection of artifacts. If the centre proves its ability to attract visitors, the capital to fund significant expansion should be easily found. It should be noted that this development has a high probability of attracting out of province visitors, and thus generating a higher level of tourism expenditures in the region.

Opportunities for Related Community/Private Sector Services

This development is proposed for an area of the Bow Valley that appears to have exceptionally high tourism potential. The Morley - Seebe area is the gateway to the Rocky Mountains on the Trans-Canada Highway. It is also the entrance to Kananaskis Country. If a major attraction is created in this area, the tourism demand for services in the area may rise rapidly. The development of a native interpretive centre is most likely to create a demand for restaurant services, specialty retail services and highway services in the area. The centre will also increase demand for accommodation in the area - this demand can initially be served by Nakoda Lodge and the two nearby guest ranches. It is expected, however, that additional accommodations will eventually be warranted. Similarly, camping demand in the area is likely to rise. This increase will initially be absorbed by the proposed Bow Valley South Recreation Vehicle Park (see Section 8.4), but may eventually require additional campground capacity.

FINANCIAL PROJECTIONS (YEAR 3)

Projected Visitation: 247 500

Income:

• Gate:	$750 000
• Donations:	$100 000
• Food:	$462 500

• Store:	$550 000
Total Income:	**$1 862 500**

Expenses:

• Salaries/Wages/Benefits:	$546 000
• Maintenance:	$90 000
• Exhibits:	$350 000
• Cost of Goods Sold:	$459 750
• Overhead:	$350 000
• Contingency:	$65 000
Total Expenses:	**$1 860 750**

Operating Surplus: $1,750

NATIVE INTERPRETIVE CENTRE ECONOMIC IMPACTS

	Regional	Provincial	Jobs
• Construction Impact	$7 312 000	*	179
• Operations Impact	$2 058 000	*	61
• (Indirect) Visitor Spending Impact	$4 901 000	*	54
• Provincial Income Taxes - Construction	*	$600 300	*
• Annual Corporate Taxes - Operations	*	$36 300	*
• Annual Taxes on Visitor Expenditures	*	$189 100	*

Source: Equus Consulting Group

This projection is for comparative purposes only and does not reflect any existing commitments on behalf of either government or proponents.

7.4 Western Heritage Centre

Description

The proposed development includes a 48 000 square foot interpretive centre. Located on the Cochrane Ranche Provincial Historic Site, the project would be built adjacent to the site where the original Cochrane Ranche was built in 1881 and would include reconstructions of some buildings from the ranch. Within the interpretive centre, there would be 10 000 square feet of exhibits accompanied by two restaurants, food services, and a custom goods gift shop.

Visitors would experience the illusion of life on the range. They would enter an exhibit area which is partly a stage setting for first hand experiences and encounters. They would also see the natural prairie as it was 100 years before, and they would experience live demonstrations, re-enactments and presentations. The Western Heritage Centre plan is to provide entertainment and education together. The site is located immediately west of Cochrane (see Figure 7).

Rationale

1. Attractiveness to tourists: The ranching/rangeland theme is attractive internationally, and the cowboy remains a popular folk hero.
2. Excellent site: The proposed site is in the Bow Corridor, near four well-travelled highways, and convenient to Calgary - Banff tourists.
3. Authenticity: The site is an authentic historic ranching site, and is located in the heart of ranching country.
4. Ranch/rodeo country: The development would increase the profile of the ranching theme, and would tie in to major international attractions like the Calgary Stampede, and the Spruce Meadows tournaments.
5. Education and public information: The Centre would fulfill a need to provide improved public education about the history of the livestock industry and rodeo.

Potential Barriers

1. Land acquisition: The proposed site is owned by the provincial government. However, a lease agreement has been signed giving the

Western Heritage Centre a 99 year lease of 25 acres of the Cochrane Ranche Provincial Historic Site.

2. Planning and construction: Costs for the development have been set at $10 000 000. In the long term, a second phase (reconstruction of historic buildings and outdoor display/performance areas) may cost an additional $2 000 000, if approved.
3. Operations and maintenance: The Centre will cost $2 100 000 annually to operate and maintain. More than 75 percent of this cost will be supported by onsite revenue generators, endowments and donations.
4. Community Approval: The Department of Culture and Multiculturalism controls the site. The Western Heritage Centre will operate on a parcel of land leased from the Department of Culture and Multiculturalism. The local community is largely supportive, but some conflicts remain over site selection. The Municipal District has not yet been approached for development approval.

Strengths

1. Theme is attractive to tourists.
2. Many attractions and services in region are related to theme.
3. Highly accessible site, with excellent tourist traffic.
4. Large population nearby already drives to Cochrane on day trips.
5. Large, scenic grounds.
6. Food services and retail goods onsite.
7. Dynamic and involving display area.
8. Historic authenticity.

Weaknesses

1. Lack of existing historic ranch buildings.
2. Close to suburban residential area (weakens "ranch" illusion).
3. Lack of livestock display area onsite.
4. Potential conflict with Cochrane Ranche development.
5. Lack of local overnight accommodation.

Anticipated Markets and Visitation

Based upon focus groups and market studies undertaken for the Centre, the site is expected to attract the following audiences.

Where Will the Site Draw From?

• Local Markets:	78%
• Enroute:	10%
• Western Canada:	5%
• North America:	4%
• Offshore:	3%

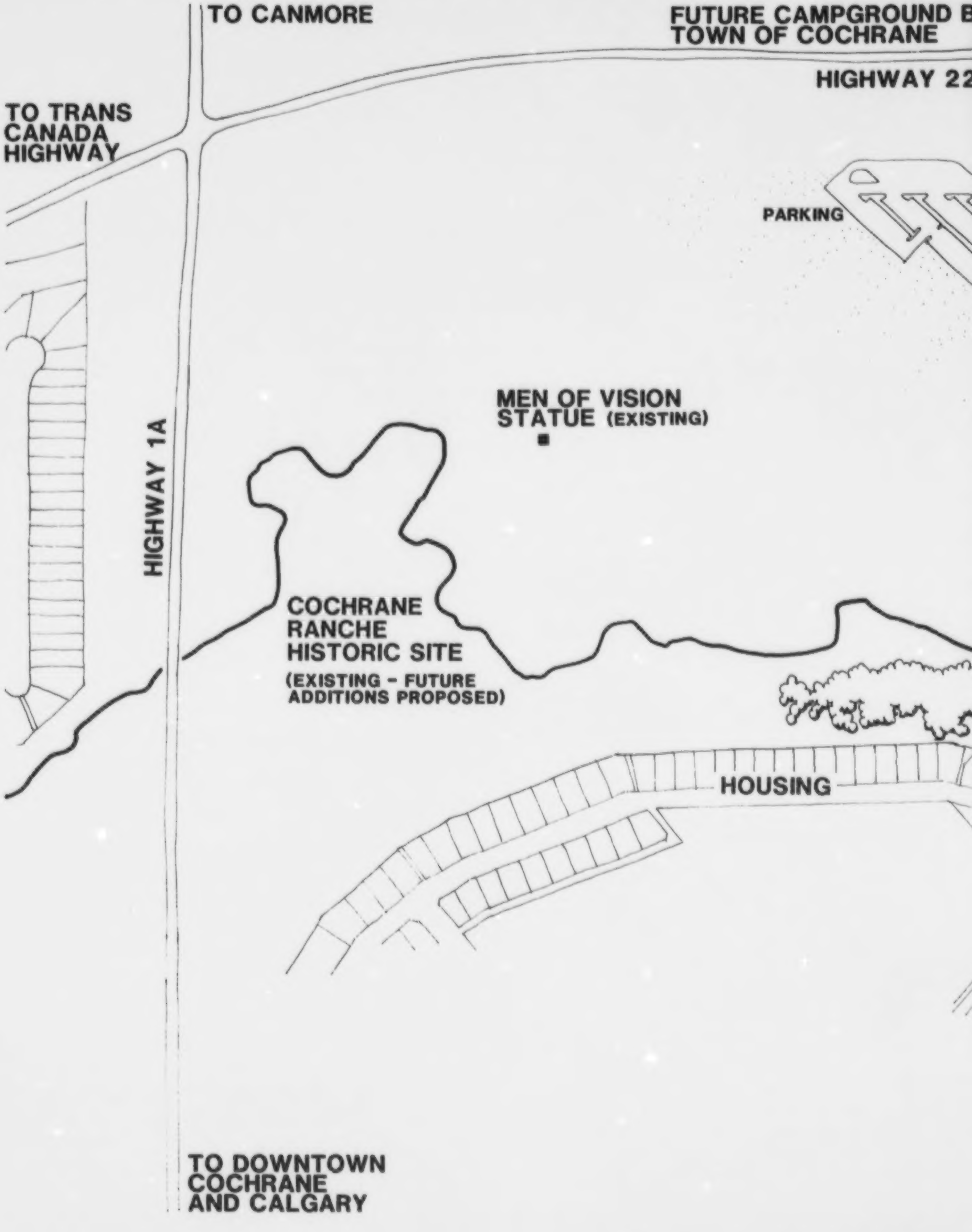
Who Will the Site Draw (in Year Three)?

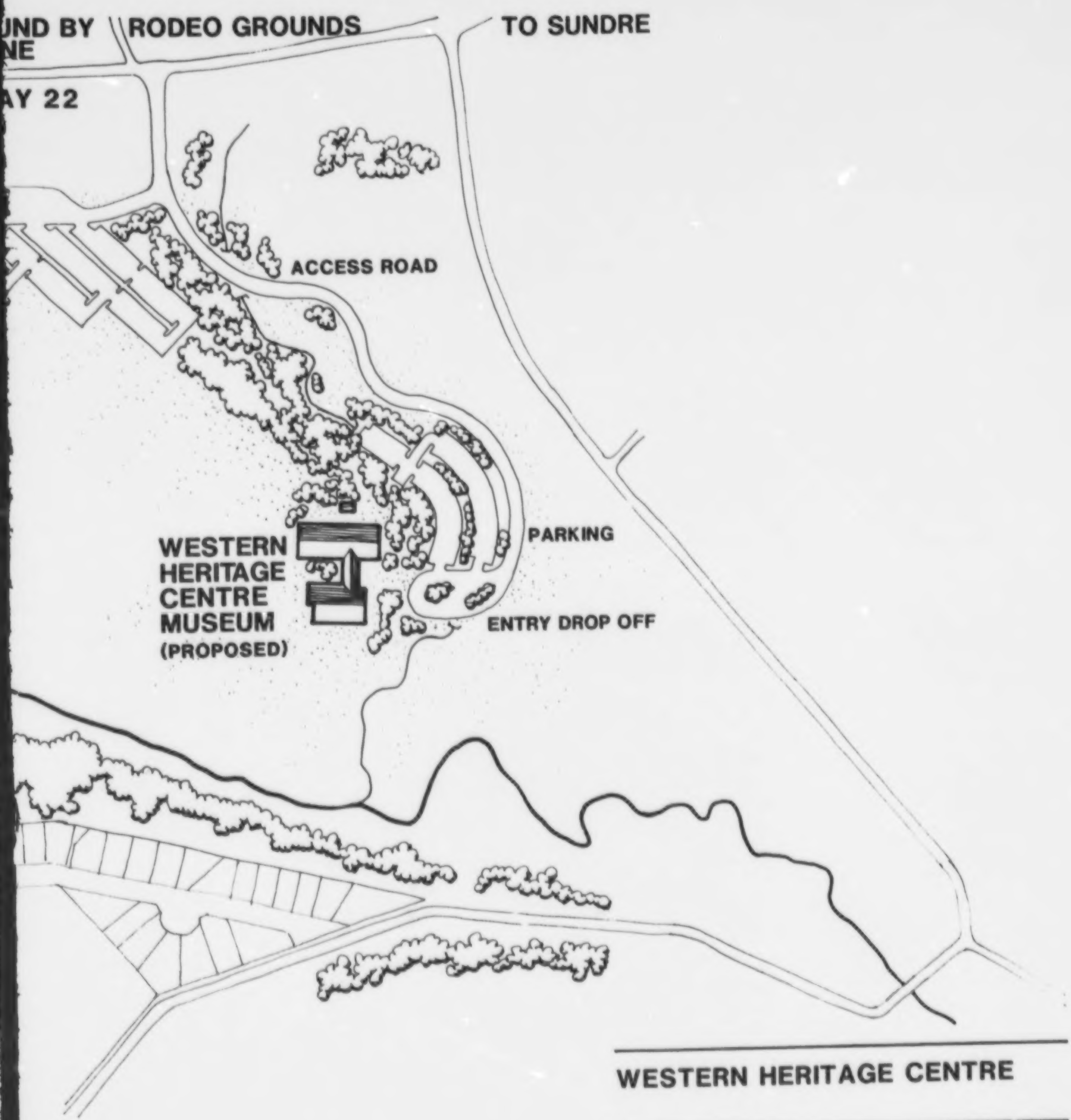
• Families:	128 000
• Mature:	25 000
• Singles/Couples:	38 000
• Corporate/Convention:	10 000
• Tours/Special Interest:	19 000
• Predicted Total Annual Visitation:	220 000

Observations

The Western Heritage Centre proposal can provide a significant "anchor" to the western (ranch) theme that is emerging within the area. It has potential to build from the proven success of the Calgary Stampede. It can also anchor tourism promotions for other western theme services (eg. guest ranches, trail rides). However, success will require that management and marketing of the Centre are highly effective and emphasize quality, entertainment and innovation.

The intention to operate the Western Heritage Centre and the Cochrane Ranche on the


TO CANMORE
FUTURE CAMPGROUND B
TOWN OF COCHRANE
HIGHWAY 2
TO TRANS CANADA HIGHWAY
PARKING
HIGHWAY 1A
MEN OF VISION STATUE (EXISTING)
COCHRANE RANCHE HISTORIC SITE
(EXISTING - FUTURE ADDITIONS PROPOSED)
HOUSING
TO DOWNTOWN COCHRANE AND CALGARY


UND BY
NE
RODEO GROUNDS
TO SUNDRE
AY 22
ACCESS ROAD
PARKING
WESTERN HERITAGE CENTRE MUSEUM (PROPOSED)
ENTRY DROP OFF

WESTERN HERITAGE CENTRE

FOOTHILLS TOURISM DESTINATION RESORT PLAN

NORTH

SCALE 1 : 4000

0 50 100m

FIGURE

7

same site as separate, but co-ordinated, attractions may weaken the potential overall appeal. This will be particularly true since the entry fees are significantly different. There are no fees charged for entry to the Provincial Historic Site. As well, the ability to attract year-round visitation to the site may be questionable. The Centre may have to operate initially as a seasonal attraction.

The financial success of the Centre is strongly predicated upon gate revenues. The willingness of people to pay for an attraction such as this when other major interpretive centres are available free is unknown.

WESTERN HERITAGE CENTRE ECONOMIC IMPACTS

	Regional	Provincial	Jobs
• Construction Impact	$7 312 000	*	180
• Operations Impact	$2 312 000	*	69
• (Indirect) Visitor Spending Impact	$3 100 000	*	19
• Provincial Income Taxes - Construction	*	$600 300	*
• Annual Corporate Taxes - Operations	*	$29 000	*
• Annual Taxes on Visitor Expenditures	*	$148 100	*

Source: Equus Consulting Group

Opportunities for Related Community/Private Sector Services

The development of the Western Heritage Centre could create an important "anchor" for western heritage tourism in Cochrane. This would create opportunities for restaurants, specialty retail services (especially arts, crafts and souvenirs), highway services (gas, fast food, groceries), and possibly accommodations. The development of accommodations in Cochrane is difficult to predict because of the proximity to Calgary: tourists are likely to book rooms in Calgary unless Cochrane is seen to (a) provide unique, regional hostelries and/or (b) be a convenient place to stop before departing for Banff along the scenic route.

In addition, the development of the Centre will help create growth for western theme accommodations and adventure opportunities, since the Centre will be highly visible, and is interested in cross-marketing with western theme services in the area.

FINANCIAL PROJECTIONS (YEAR 3)

Projected Visitation: 220 000

Income:

• Gate:	$792 000
• Donations/ Endowments:	$300 000
• Food (net):	$319 077
• Store (net):	$197 000
Total Income:	**$1 608 077**

Expenses:

• Salaries/Wages/Benefits:	$1 032 718
• Maintenance:	$151 483
• Exhibits:	$433 000
• Overhead: (Includes Cost of Goods Sold)	$385 000
• Contingency:	$100 108
Total Expenses:	**$2 102 309**

Operating Surplus (Deficit): ($494 232)

This projection is for comparative purposes only and does not reflect any existing commitments on behalf of either government or proponents.

PROPOSED REGIONAL SERVICES & ATTRACTIONS

A number of major regional services and attractions have been proposed for the study area. Those mentioned here have proceeded beyond the speculative stage and have established commitments to land holdings in the area. The regional benefits described for each are based upon visitor attendance and expenditure assumptions described in Appendix 2. Community Tourism Action Plan priorities are consistent with the regional services and attractions presented here.

Estimated use figures were provided by the operators, along with estimated capital costs. Economic impacts estimation methods have been carried over from Chapter 7.

8.1 Maximum View Guest Ranch

The Maximum View Guest Ranch is a proposed major accommodation facility that will offer trail riding, adventure vacations and retreats in a very luxurious setting (see Figure 8). It will cater to well-to-do clients. The facility will extend the success of the Maximum West Ranch Club which has had international clients since 1987.

Located northwest of Millarville, the facility will include a 16 room luxury lodge, supported by 32 deluxe cabins. It will be designed to portray a western heritage theme throughout, including restored historic buildings and replicated horse-drawn coaches onsite. The facility will be unique within Alberta, catering to a select wealthy clientele that is prepared to pay a premium price for first class retreat/adventure opportunities. While there are no directly comparative facilities, Jasper Park Lodge is reasonably comparative in terms of scale, opportunities and clientele.

MAXIMUM VIEW GUEST RANCH
Regional Impacts

Visitors:	7 000
Temporary Construction Impact ($):	15 953 000
Temporary Construction Impact (jobs):	256
Visitor Expenditure Impact ($):	3 062 500
Visitor Expenditure Impact (jobs):	76

The Maximum View will attract between 6 000 and 10 000 visitors to the area annually, but its impact will be felt well beyond this visitation. This will be a "flagship" accommodation facility that will be featured by travel writers from many locations. It will also attract visitors with high daily expenditures, and it will employ the services of many local people in the provision of recreation, adventure and food services. The development will establish a new standard for guest ranch vacations that will attract international attention.

8.2 Wintergreen

Wintergreen is a major recreation facility which attracts significant use from the city of Calgary. It currently includes a regional ski hill and clubhouse, and is now adding an 18 hole golf course and golf clubhouse. The developers intend to add another nine holes to the course, and a swimming pool in the near future.

WINTERGREEN
Regional Impacts

Golfing Rounds:	35 000
Ski Hill Visitors:	100 000
Temporary Construction Impact ($):	3 850 000
Temporary Construction Impact (jobs):	72
Visitor Expenditure Impact ($):	4 725 000*
Visitor Expenditure Impact (jobs):	117

*(*Includes both ski hill and golf course.)*

Located near Bragg Creek, the development offers excellent recreation facilities for regional users. The ski hill attracts 100 000 users annually, and the combined facility is expected to attract nearly 140 000 visitors. The manager of the facility has a very active marketing strategy and is constantly adjusting the product to match visitor expectations. Although the facility attracts most of its use from Calgary residents, it does draw significant expenditures into the study area. Wintergreen is aiming to become a model of a successful regional recreation attraction.

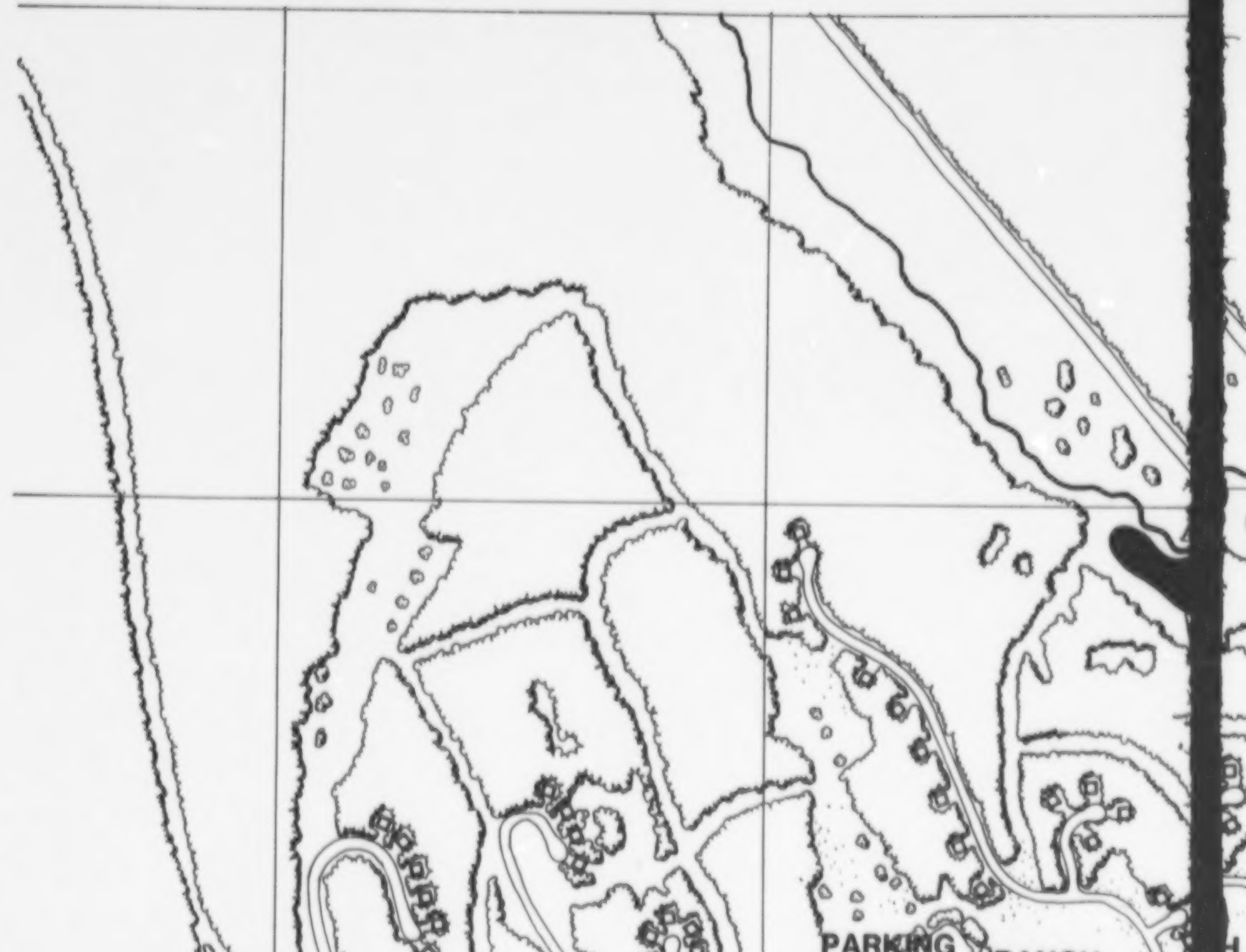
8.3 Okotoks Erratic

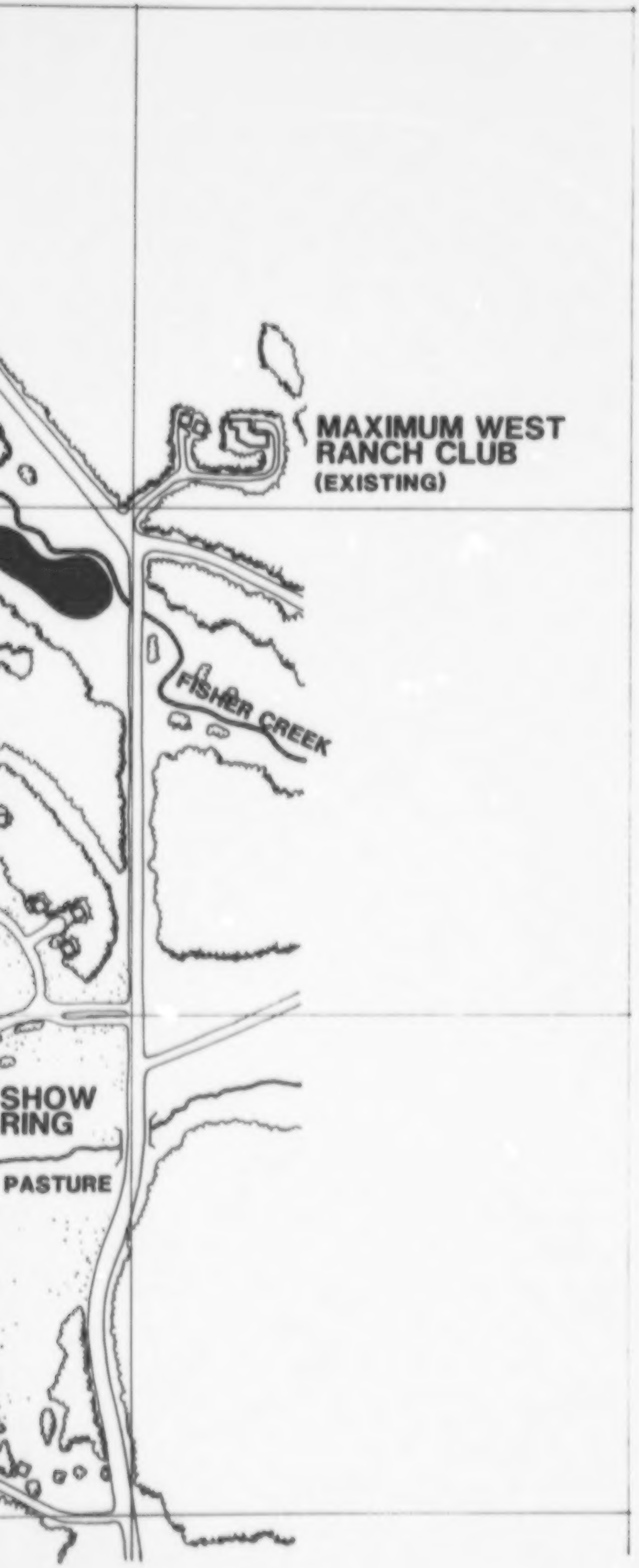
Located only six kilometres west of Okotoks, the Okotoks Erratic is a huge boulder weighing more than 18 000 tons (see Figure 9). It was deposited by glaciers several thousand years ago. The giant boulder has attracted attention since man first arrived in this area: the native people viewed it as a "spirit rock". In modern times, scientists have determined that the rock was deposited here by glaciers, but many mysteries about its origin and its condition remain.

The site was obtained by the Department of Culture in 1987, and has been managed by the government since then. Some minor improvements have been undertaken: a roadside pull-off, parking for cars, recreation vehicles and buses, and fencing. There is an obvious lack of interpretive signs, and a serious lack of a trail to the attraction. The site is currently visited for two reasons: as a simple roadside point-of-interest, and as a practice site for climbers.

OKOTOKS ERRATIC
Regional Impacts

Visitors:	30 000
Temporary Construction Impact ($):	1 153 000
Temporary Construction Impact (jobs):	9
Visitor Expenditure Impact ($):	630 000
Visitor Expenditure Impact (jobs):	16


PARKING
RANCH CENTRE
LODGE
SHO
RING
LAKE
PAST
KANANASKIS COUNTRY
LAKE
PASTURE
PASTURE
PASTURE


MAXIMUM WEST RANCH CLUB
(EXISTING)
FISHER CREEK
SHOW RING
PASTURE

MAXIMUM VIEW RANCH

FOOTHILLS TOURISM DESTINATION RESORT PLAN

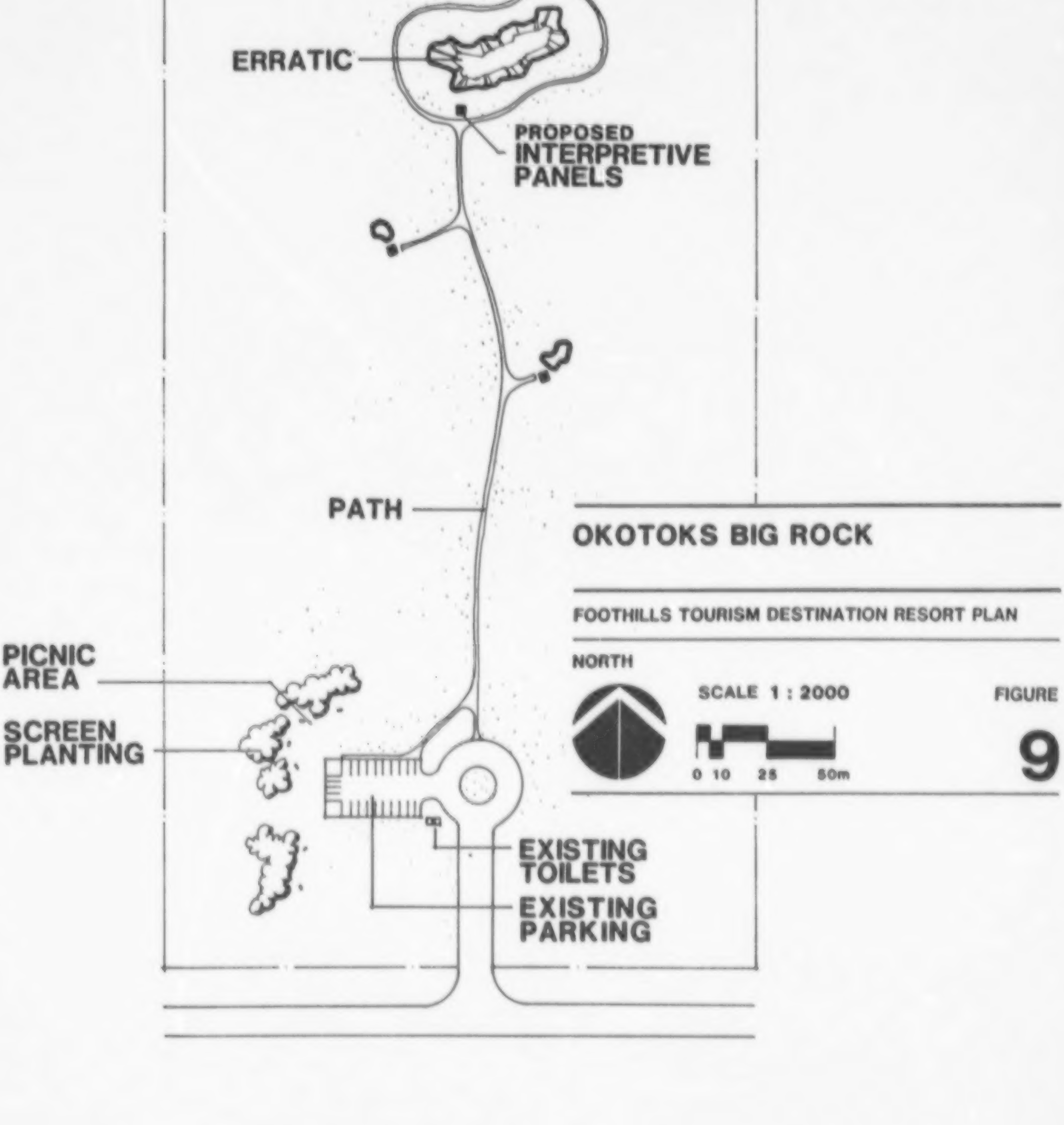
NORTH

SCALE 1 : 10 000

0 50 100 250m

FIGURE

8


ERRATIC
PROPOSED INTERPRETIVE PANELS
PATH
PICNIC AREA
SCREEN PLANTING
EXISTING TOILETS
EXISTING PARKING
NORTH
SCALE 1 : 2000
0 10 25 50m

OKOTOKS BIG ROCK

FOOTHILLS TOURISM DESTINATION RESORT PLAN

FIGURE 9

While this site is unlikely to become a significant generator of tourism traffic into the region, it does have value as an interpretive pull-off. There are no current figures for visitation, but it is estimated that the site would attract almost 30 000 visitors annually if finished with a universally accessible trail and interpretive panels. These visitors would be largely touring vacationers (the largest potential growth market for the area). Their expenditures in the area would be affected to the extent that they might consider taking a scenic drive and/or stopping in the area for gas and a meal.

8.4 Bow Valley South Recreation Vehicle Park

A 110 site campground is proposed by a private sector developer for a site in that portion of Bow Valley Provincial Park south of Highway #1. This campground would include both fully serviced and partly serviced sites. Campers would have the benefit of a day lodge as well. The developer is also considering the addition of portable accommodation units and the provision of food catering services. No specific tourism markets have been established for this site, but it is expected to receive most of its visitation from Trans-Canada Highway travellers. Eighty percent of the visitation is expected to occur during a 100 day season, and full occupancy is expected on summer weekends.

BOW VALLEY SOUTH RECREATIONAL VEHICLE PARK
Regional Impacts

Overnight Visitors:	13 500
Temporary Construction Impact ($):	2 750 000
Temporary Construction Impact (jobs):	52
Visitor Expenditure Impact ($):	992 000
Visitor Expenditure Impact (jobs):	25

8.5 Golf Courses

A number of golf courses have been proposed for the study area. Typically, they consist of 27 holes, and are proposed to offer international calibre links, designed by experienced local golf course designers. The golf courses all offer full clubhouse facilities. All are targeted to attract the overflowing demand from the city of Calgary. The figures below describe the typical economic impact of one of these courses, which would be likely to attract about 1 500 rounds of use per week from outside the region.

TYPICAL GOLF COURSE
Regional Impacts

Golfing Rounds:	30 000
Temporary Construction Impact ($):	3 850 000
Temporary Construction Impact (jobs):	72
Visitor Expenditure Impact ($):	1 312 500
Visitor Expenditure Impact (jobs):	33

8.6 Cochrane Ranche Provincial Historic Site

This site, located on 150 acres on the northeast boundary of the town of Cochrane, is owned and operated by the Historic Sites Service, Alberta Culture and Multiculturalism. The theme depicts the history of ranching as a major contributor to human settlement and economic development in southern Alberta and the province.

The site has had steadily increasing visitation since 1985, with the 1988 Winter Olympics having a significant effect. Visitation is currently around 30 000 people per year with the majority being Albertans (approximately 70 percent) and the remainder originating in the rest of Canada and internationally.

The ranche has been open since 1979. The site has remnants of five historic ranch buildings dating from 1884. A visitor centre was opened in 1980. Alberta Culture and Multiculturalism is facilitating a development master plan for the site. At completion the master plan will identify a number of site development options, proposed capital, and operating costs. Since the master plan is currently under review, no capital and operating costs could be provided, therefore, potential regional economic impacts have not been presented here.

Site assessment is currently underway for the location of the proposed Western Heritage Centre (see Section 7.4) within the boundaries of the Cochrane Ranche.

8.7 Kananaskis Guest Ranch Golf Resort

A family vacation destination resort, incorporating existing guest ranch services and facilities, is being developed at the intersections of Highways 1 and 1X in the Seebe area. When completed, the development is proposed to include an 18 hole golf course, campground/recreational vehicle park development, and an equestrian (polo field) area. Currently, the majority (55 to 60 percent) of the visitors to the Kananaskis Guest Ranch are attracted from outside Alberta, generally originating from (in order) the United States, Europe, Western Canada, Central and Eastern Canada and Japan. Albertans represent approximately 40 percent of the visitors to the Kananaskis Guest Ranch. The primary operating season is 150 days in length (May to October). No construction cost estimates or anticipated visitation levels were made available for this proposed development, therefore, potential regional economic impacts have not been presented here.

8.8 Four Seasons Recreational Vehicle Park

There is a proposed family vacation - destination resort, centred on a recreational vehicle park, being considered by a private developer for the Seebe area. The development is proposed to include a resort recreation centre, 600 recreational vehicle stalls, playing fields, a golf driving range, skating and tobogganing facilities, indoor/outdoor pool and 50 units of fixed roof accommodation. Potential markets for the development and estimated capital and operating costs were not available for this proposed development. No estimate of potential regional economic impact has been provided here.

CHAPTER • NINE

CONCLUSIONS AND RECOMMENDATIONS

There is significant opportunity to develop tourism in the Foothills area, and to increase regional economic benefits from tourism. However, this economic development is unlikely to be gained from a single major investment. Instead, it will require an integrated and co-ordinated response within the study area.

Throughout the world, government has been a major investor and stimulator in the development of the tourism industry. This study has assessed the potential for investments (public, private, and non-profit) to stimulate tourism development in the Foothills area. There are many ways the provincial government can effectively support development of tourism industry in the Foothills area; these are listed in Section 9.4 below. Among these investments, supporting the development of a provincially significant tourism generator provides only one potential strategy. The choice of the appropriate strategy will be dependent upon market priorities, economic feasibility, revenue generating capabilities and development criteria which have not yet been defined.

9.1 Tourism Opportunities

The area has already received very high visitation from tourists. However, a high percentage of these visitors merely travel through the area, and do not stop to purchase services. Because the area is flanked on one side by Calgary, and on the other by Rocky Mountain resort areas, it is perceived to be a scenic area to drive through, rather than as a place to stop. The greatest concentration of drive-through traffic occurs on the Trans-Canada Highway, which is essentially an expressway between Calgary and Banff National Park. The area is also used extensively by Calgarians as a day trip or scenic drive area. The following is a list of opportunity markets, arranged in order of potential magnitude:

1. *Trans-Canada Highway Traffic*

    (a) Day use
    (b) Enroute to vacation
    (c) Touring vacation

Opportunity: Attract this traffic off of the expressway, and offer services and facilities that cater to the needs and interests of these travellers, in a highly scenic setting. Services and attractions will be competing with Banff for visitors. Short "comfort stops" (service/education/experience stops under two hours), and "overnight experience" stops (overnight stay in a unique or highly scenic location) will be the most likely attractions.

2. *Calgary Day Use Traffic*

Opportunity: Calgarians already have developed day use patterns to the area for ice cream (Cochrane) and upscale purchases (Bragg Creek). Other day use attractions offering "limited availability" goods or meals, in scenic settings will further stimulate this market.

3. *Touring Vacation Traffic*

Opportunity: There is potential for the area to attract visitors who want to visit several facilities and attractions in the area, as a personal touring experience. These people are looking for something different (regional themes/educational opportunities).

4. *Adventure/Recreation Vacation Traffic*

Opportunity: The area is highly attractive for land and river based recreation that offers a challenge to participants. The most common existing services in this market are guest ranches (trail riding), golf courses, and river rafting tours. More trail activity opportunities could be developed. The market will respond to appropriate challenges in scenic settings, especially when the topography is integrated into the experience offered.

9.2 Market Trends and Product Positioning

Over the past several years, the Foothills area has received a steadily increasing number of visitors who seek outdoor recreation, adventure and unique regional shopping or eating experiences. The greatest amount of this traffic originated in the city of Calgary. This flow of traffic has been stimulated by the development of Kananaskis Country and several golf courses in the area. There is evidence of an increased interest in the rural lifestyle and the historical elements evident in this area. The impressive scenery has made the area increasingly attractive to affluent Calgarians as a country residential area. This interest has rapidly increased land values, and has therefore increased the perceived "value" of the landscape.

Following the success of the 1988 Winter Olympics, Calgary has improved its international profile, and visits by out-of-province tourists were increasing at the time this report was prepared. As well, the tourist demand at Banff has reached a point where overcrowding and commercialization are beginning to disappoint tourists who expected a more rural experience. This demand is beginning to be captured in Canmore, and facilities are being developed along the Bow - Canmore Corridor.

The area currently does not have a consolidated market "image". Most tourists see it as a scenic area that one passes through to get to one's destination. The High River - Longview area has developed an image as "ranching country", but this image is supported by very few visible tourism elements. Otherwise, the only strong attractions are Bragg Creek (scenic day trip area with services) and Cochrane (place to go for ice cream), neither of which are known beyond the region.

The area must develop a stronger market position. Ideally, it should consolidate the historical western "ranch" theme, and make this theme much more accessible and evident to tourists. As well, the area should position against the Rocky Mountain resort areas by emphasizing that it is uncrowded and offers a

more authentic experience. In order to strengthen its position, the area must also offer outlets for food and goods that are viewed as "high quality" and "unique".

9.3 Role of Generators

Major tourism generators are intended to attract new tourism visitation to the province, and to stimulate regional economies through increases in tourism expenditures in the area. More specifically, the purpose of developing one or more provincially significant generators in the Foothills region would be to:

(a) improve market image and position of the area, by providing an identifiable and accessible attraction;

(b) stimulate tourist expenditures in the Foothills area;

(c) "anchor" a theme or image which commercial services can then extend;

(d) attract visitors from the main highway routes in the area into stopping on their way through;

(e) attract increased visits and expenditures from Calgarians; and

(f) attract out-of-province visitors to the area as part of a touring vacation or adventure vacation.

Decisions about generator investments should be based upon these objectives. The decision about where generator investments will be best placed will be related to the perceived priority order of the objectives.

Chapter 7 describes the data for each of the four tourism generators proposed for the area. These data should be used to establish priorities for funding or support. There is room for more than one generator in this study area only if:

(a) the generators are phased in at different times;

(b) the generators are strongly linked through co-ordinated themes and promotion; and

(c) the market is continually monitored during the development cycle to ensure that the supply is not saturating the demand.

9.4 Investments in Tourism Development

The development of a tourism economy in the Foothills area will not be stimulated by any one investment. Instead, there is a need to create focus and co-ordination of tourism investments to create benefits and continued growth. It will be important that all sectors participate and co-ordinate their efforts to create success (refer to Chapter 5). The most important improvements are listed below:

1. Development of a theme, market positioning, and an image that will be consistently portrayed to visitors. This image must be obvious to tourists and readily accessible to them. The historical western "ranch" theme is already well initiated in some locales and would provide a successful basis for tourism development.

2. Development of scenic routes along Highways 1A and 22, including thematic signing and interpretive pull-outs.

3. Development of a provincially significant or major generator and recreation services. One or more first class interpretive centres would be an appropriate attraction to induce visitors to stop within the study area. Services that emphasize outdoor recreation and adventure

opportunities such as golf courses, guest ranches, ski hills, trail use areas, and river adventure areas will attract new visitors to the area. Conformation to the western theme will increase their success.

4. Development of specialized food and retail services adjacent to major services and attractions.

5. Development of themed townscapes offering attractive "main street" presentations to visitors.

6. Development of themed rural accommodation opportunities (largely bed and breakfast, country lodge or guest ranch types). The accommodation industry will have to offer "niche" appeal; generic motel investments are unlikely to pay off in this area.

It is recommended that tourism developments in this area focus upon specific markets (see Section 9.1) and be approached in an incremental manner. Rather than risking major investments to theoretical market demand, the government should encourage a process of incremental improvement. This will minimize the risk of public dollars, and will ensure that facilities grow in concert with market demand. Additional conditions that will be important to creating success include the following:

- Image and promotion of the area must be planned and co-ordinated;

- Generators must be co-ordinated with retail services (and accommodation, if possible) in order to maximize return on investment;

- Existing businesses must be encouraged to make incremental investments and diversify within the existing framework;

- The potential of Indian reserves as tourism development sources must be recognized;

- The importance of the family market and the need for child-oriented facilities must be considered;

- The strength of the bed and breakfast/guest ranch accommodation within this area must be recognized and supported; and

- The potential weakness of this area in the cold weather months must be minimized through the development in integrated indoor- outdoor opportunities, winter "get-away" events, and attractive retail environments and food services.

The tourism potential of this area is significant, but highly dependent upon getting existing visitors to stop and purchase goods and services. Like many near urban areas, this area will have to develop very specific tourism markets and "niche" offerings that appeal to urban residents. The trade-offs regarding increased traffic and activity in this peaceful, rural setting will cause some public conflicts, particularly in Zone B, and these should be resolved through an appropriate linkage between planning and public involvement.

BIBLIOGRAPHY

1) Alberta Bureau of Statistics, Alberta Statistical Review Second Quarter, 1989,
Edmonton, 1989.

2) Alberta Bureau of Statistics, Population Projections Alberta 1987 - 2016,
Edmonton, 1988.

3) Alberta Bureau of Statistics, 1986 Census of Canada Population of Unincorporated Places - Alberta,
Edmonton, 1988.

4) Alberta Bureau of Statistics, 1986 Census of Canada Population of Cities, Towns, Villages, and Indian Reserves Located Within Counties, Municipal Districts, Improvement Districts, and Special Areas - Alberta,
Edmonton, 1988.

5) Alberta Bureau of Statistics, Economic Multipliers for Alberta Industries and Commodities,
Edmonton, 1987.

6) Alberta Forestry Lands and Wildlife, Ghost River Sub-Regional Integrated Resource Plan,
Edmonton, 1988.

7) Alberta Forestry Lands and Wildlife, Guide to Big Game Hunting,
Edmonton, 1989.

8) Alberta Forestry Lands and Wildlife, Guide to Game Bird Hunting,
Edmonton, 1989.

9) Alberta Forestry Lands and Wildlife, Guide to Sport Fishing,
Edmonton, 1989.

10) Alberta Forestry Lands and Wildlife, Eden Valley Local Integrated Resource Plan (Draft Plan),
Edmonton, 1989.

11) Alberta Forestry Lands and Wildlife, Kananaskis Country Sub-Regional Integrated Resource Plan,
Edmonton, 1986.

12) Alberta Forestry Lands and Wildlife, Livingstone - Porcupine Hills Sub-Regional Integrated Resource Plan,
Edmonton, 1987.

13) Alberta Forestry Lands and Wildlife, The Alberta Natural Areas System - Objectives, Principles and Procedures,
Edmonton, 1988.

14) Alberta Forestry Lands and Wildlife, A Listing of Outfitters and Outfitter Guides (Unpublished),
Edmonton, 1987.

15) Archeological Survey of Alberta, Occasional Papers Nos. 22, 27, 28, and 30,
Edmonton, (various dates).

16) Alberta Municipal Affairs, Official Population List 1989,
Edmonton, 1989.

17) Alberta Recreation and Parks, Economic Evaluation Framework for Park Planning,Vol. 1,
Edmonton, 1986.

18) Alberta Recreation and Parks, 1987 Parks Guide (Unpublished),
Edmonton, 1987.

19) Alberta Tourism, Alberta Campground Guide,
Edmonton, 1989.

20) Alberta Tourism, Historic Dunvegan - Peace River Destination Resort Plan,
Edmonton, 1989.

21) Alberta Tourism, Travel Alberta, West Central Alberta Tourism Destination Area Study,
Calgary, 1981.

22) Alberta Recreation and Parks, 1984 Public Opinion Survey on Recreation - Summary,
Edmonton, 1985.

23) Alberta Tourism, Travel Alberta, Alberta Touring Guide,
Edmonton, 1988.

24) Alberta Tourism, Travel Alberta, Alberta Winter Vacationers' Guide,
Edmonton, 1989.

25) Alberta Tourism, Travel Alberta, Calgary - Canmore Tourism Destination Area Study, Volume I: Inventory and Assessment,
Calgary, 1985.

26) Alberta Tourism, Travel Alberta, Calgary - Canmore Tourism Destination Area Study, Volume II: Tourism Development Strategy,
Calgary, 1985.

27) Alberta Tourism, Planning Division, Chinook Country Tourism Destination Area Study,
Edmonton, 1984.

28) Alberta Tourism, Lesser Slave Lake Destination Resort Plan,
Edmonton, 1989.

29) Alberta Tourism, Marketing Division, Marketing Activities 1989-90,
Edmonton, 1989.

30) Alberta Tourism, Planning Division, Remington Carriage Museum Tourism Destination Resort Plan,
Edmonton, 1989.

31) Alberta Tourism, 1982 Alberta Travel Survey, A Non-Resident Visitor Study, Summary Report Volume I,
Edmonton, 1982.

32) Alberta Transportation, Traffic Volume Breakdown on Primary, Secondary and Other Roads (1973 - 1988),
Edmonton, 1989.

33) Black Diamond Tourism Action Committee, Community Tourism Action Plan (Draft),
Black Diamond, Alberta, 1989.

34) Calgary Regional Planning Commission, Municipal District Bighorn #8 - General Municipal Plan,
Calgary, 1987.

35) Calgary Regional Planning Commission, Municipal District Bighorn #8 - Technical Supplement to the General Municipal Plan 19 - Part I: Bow Corridor,
Calgary, 1985.

36) Calgary Regional Planning Commission, Regional Recreation Study: An Examination of Supply, Demand, and Emerging Policy Directions,
Calgary, 1984.

37) Calgary Regional Planning Commission, Environmentally Significant Areas Study,
Calgary, 1983.

38) Calgary Regional Planning Commission, Agriculture in the Calgary Region 1981 - 1986, Regional Trends Review, Volume I, No. 3,
Calgary, 1988.

39) Calgary Regional Planning Commission, Employment Patterns, Retail and Service Trade Survey Highlights, Regional Trends Review, Volume 2, No. 3,
Calgary 1989.

40) Calgary Regional Planning Commission, Labour Force Characteristics, Location of Employment, Assisting Local Businesses, Regional Trends Review, Volume I, No. 2, Calgary, 1987.

41) Calgary Regional Planning Commission, Manufacturing Survey Highlights, Labour Force Characteristics, Regional Trends Review, Volume 2, No. 4, Calgary, 1989.

42) Calgary Regional Planning Commission, Nature of Employment, Municipal Finance, Community Economic Development, Regional Trends Review, Volume I, No. 4, Calgary, 1988.

43) Calgary Regional Planning Commission, Prospect '89 - The Region's Tourism Market, Calgary, 1989.

44) Calgary Regional Planning Commission, Regional Economic Trends, Calgary, 1988.

45) Calgary Regional Planning Commission, Regional Economic Trends - Household Survey Summary Report, Calgary, 1986.

46) Calgary Regional Planning Commission, Municipal District Rocky View #44 - General Municipal Plan, Calgary, 1983.

47) Calgary Regional Planning Commission, Rural Population Change 1981 - 1986, Subdivision Activity, Free Trade and Canadian Communities, Regional Trends Review, Volume 2, No. 1, Calgary, 1988.

48) Calgary Regional Planning Commission, The Calgary Regional Plan, Calgary, 1988.

49) Calgary Regional Planning Commission, Total Value of Construction 1978 - 1987, Average Income, Comparisons of Municipal Indicators, Regional Trends Review, Volume 2, No. 2, Calgary, 1988.

50) Calgary Regional Planning Commission, Trade Areas, Population Change from 1981 to 1986, Subdivision Activity, Average Income, Regional Trends Review, Volume I, No. 1, Calgary 1987.

51) Calgary Regional Planning Commission, High River General Municipal Plan,
Calgary, 1983.

52) Calgary Tourist and Convention Bureau, Calgary and Area Tourism Marketing Plan 1988/1990,
Calgary. (N.D.)

53) Calgary Tourist and Convention Bureau, Stampede Visitor Study,
Calgary, 1988.

54) Chief Jacob Bearspaw Stoney Indian Band Tourism Action Committee, Community Tourism Action Plan,
Morley, Alberta, 1988.

55) Chinook Country Tourist Association, Chinook Country Team Tourism Marketing Plan,
Lethbridge, 1988.

56) Colorado Tourism Board, Colorado's Opportunities in the U.S. Pleasure Travel Market,
Denver, Colorado, 1988.

57) David Thompson Country Tourist Council, Team Tourism Marketing Plan,
Red Deer, Alberta, 1988.

58) Environment Canada, The Tourism and Outdoor Recreation Climate of the Prairie Provinces,
Toronto, 1976.

59) Goodstoney Tourism Action Committee, Community Tourism Action Plan (Draft),
Morley, Alberta, 1988.

60) High River Tourism Action Committee, Community Tourism Action Plan,
High River, Alberta, 1988.

61) Leduc Tourism and Convention Association, Alberta's Oil Industry Interpretive Park - Feasibility Study,
Edmonton, 1989.

62) Municipal District of Big Horn No. 8 Community Tourism Action Committee, Community Tourism Action Plan,
Exshaw, Alberta, 1989.

63) Municipal District of Rocky View No. 44, Community Tourism Action Plan,
Calgary, 1989.

64) Okotoks Tourism Action Committee, Community Tourism Action Plan,
Okotoks, Alberta, 1988.

65) Nanton Tourism Action Committee, Community Tourism Action Plan,
Nanton, Alberta, 1989.

66) Sarcee Nation Community Tourism Action Committee, T'suu T'ina Community Tourism Action Plan (Draft),
Calgary 1989.

67) Statistics Canada, Tourism and Recreation Section, Touriscope 1988 - Tourism in Canada - A Statistical Digest,
Ottawa, 1988.

68) Statistics Canada/Alberta Tourism, 1986 Travel Survey - Canadian Visitors Only; Tourism Zone 4 - David Thompson and Tourism Zone 10 - Calgary and Area,
Edmonton, 1986.

APPENDICES

Appendix 1:
Market Characteristics

Appendix 2:
Regional Services and Events

Appendix 3:
Community and Personal Contacts

Appendix 4:
Community Tourism Action Plan Priorities

Appendix 5:
Inventory of Attractions and Events

APPENDIX 1:

Market Characteristics

TOURING VACATION FOCUS GROUP RESEARCH
November 8 - 9, 1989

Canamera Management Ltd.

1.0 INTRODUCTION

The focus groups were conducted in the Edmonton area on November 8 and 9, 1989. A total of 25 people were invited to participate in the project. They represented adult members of family units that include children residing in the home. Each participant used a motor vehicle for a vacation over the past year, and included their children in the vacation.

A total of 19 participants participated in the focus groups. One focus group was held late afternoon and the other group was conducted in early morning (8:30). The focus groups lasted approximately 85 minutes.

At the beginning of the focus group, each respondent was handed a map of Alberta so that they would be able to reflect on the study area under consideration.

The concept of a touring vacation was presented as the opening comments by the moderator to ensure that the participants were thinking about the touring vacation concept when they were presenting their views in the focus group.

2.0 RESULTS

2.0.1 Trip Planning

The respondents were asked to reflect on their trip planning habits. They were asked how much in advance they would plan a touring vacation. This question presented them with some difficulty in that all of the categories applied.

They indicated that they would plan an overall touring trip as a family activity several weeks or months in advance. That is, they would make a decision that this was something they wanted to do.

As the time drew closer they would do more detail planning. This would involve decisions related to the order of visitation, a general plan for total time to be committed to the tour, and acquisition of supplies etc., that would be required prior to departure. Some indicated that they would try to reserve accommodation in the area while others said that they would be less restricted in their pre-trip planning.

The amount of pre-trip planning appeared to be related to the age of the children although the small database does not permit statistical testing of this perception. It appears that pre-planning increased when some of the children were pre-school age.

At the touring site they were more inclined to remain flexible. The major decisions appear to revolve around which sites would be visited, in which order they would be visited, and whether other activities would be incorporated in the touring vacation. These are presented in the order of importance based on the number of times the item was raised and the order in which it was raised by the respondent.

2.0.2 Selection Factors

Respondents were asked to rate the following factors in terms of the importance each item played in the overall vacation experience.

The following data indicates the number of respondents who selected a particular ranking, the number who ranked the item either an 8 or a 9, and the mean score (highest meaning most significant item).

	Least Important			→			Most Important			Number 8 or 9	Mean Score
	1	2	3	4	5	6	7	8	9	%	
• Convenience (located on a major touring route):	0	0	0	0	1	3	4	6	5	58	7.59
• Has beautiful scenery:	0	0	0	0	0	1	4	7	7	74	8.05
• A well-known area:	0	0	0	2	1	3	4	6	3	47	7.05
• A natural, untouched area:	0	0	1	2	4	6	3	1	2	16	6.00
• Has lots to see and do:	0	0	0	0	0	2	5	6	6	63	7.84
• An educational opportunity:	0	0	0	1	3	3	4	4	4	42	7.00
• Off the beaten path:	0	0	0	0	5	4	2	5	3	42	6.84
• Has excellent local cuisine:	0	0	1	1	5	2	4	3	3	32	6.47
• Has good affordable accommodation:	0	2	2	1	3	2	2	4	2	34	5.53
• Has many points of interest:	0	0	0	0	2	4	3	5	5	53	7.39
• A place that will entertain my children:	0	0	2	2	1	4	2	3	5	42	6.63
• Offers unique, high quality accommodation:	0	0	0	2	4	2	3	4	4	42	6.79
• A new experience for our family:	0	2	1	1	3	1	4	3	4	37	6.32
• Opportunity to view wildlife:	0	1	1	4	3	2	3	1	4	26	5.95
• A place that we could tell friends about:	0	0	0	1	3	4	3	4	4	42	6.95
• Good place to experience a different culture/way of life:	0	0	0	2	3	2	5	4	3	37	6.79
• An opportunity to experience Alberta's history:	0	0	0	1	2	4	3	5	4	47	7.11
• Not expensive:	0	1	1	2	4	3	4	2	2	21	5.95
• A world-class attraction:	0	0	0	1	2	4	3	4	5	47	7.16

The following table presents the same data but in order of importance based on the mean score ranking (highest to lowest).

	Least Important			→			Most Important			Number 8 or 9	Mean Score
	1	2	3	4	5	6	7	8	9	%	
• Has beautiful scenery:	0	0	0	0	0	1	4	7	7	74	8.05
• Has lots to see and do:	0	0	0	0	0	2	5	6	6	63	7.84
• Convenience (located on a major touring route):	0	0	0	0	1	3	4	6	5	58	7.59
• Has many points of interest:	0	0	0	0	2	4	3	5	5	53	7.39
• A world-class attraction:	0	0	0	1	2	4	3	4	5	47	7.16
• An opportunity to experience Alberta's history:	0	0	0	1	2	4	3	5	4	47	7.11
• A well-known area:	0	0	0	2	1	3	4	6	3	47	7.05
• An educational opportunity:	0	0	0	1	3	3	4	4	4	42	7.00
• A place that we could tell friends about:	0	0	0	1	3	4	3	4	4	42	6.95
• Off the beaten path:	0	0	0	0	5	4	2	5	3	42	6.84
• Offers unique, high quality accommodation:	0	0	0	2	4	2	3	4	4	42	6.79
• Good place to experience a different culture/way of life:	0	0	0	2	3	2	5	4	3	37	6.79
• A place that will entertain my children:	0	0	2	2	1	4	2	3	5	42	6.63
• Has excellent local cuisine:	0	0	1	1	5	2	4	3	3	32	6.47
• A new experience for our family:	0	2	1	1	3	1	4	3	4	37	6.32
• A natural, untouched area:	0	0	1	2	4	6	3	1	2	16	6.00
• Opportunity to view wildlife:	0	1	1	4	3	2	3	1	4	26	5.95
• Not expensive:	0	1	1	2	4	3	4	2	2	21	5.95
• Has good affordable accommodation:	0	2	2	1	3	2	2	4	2	34	5.53

The differences among the items along the range would not necessarily be statistically significant due to the small sample size, but the rank order may represent a trend with respect to the items that affect tour planning.

2.0.3 Visitation Sites

The respondents were asked whether they would visit the following sites/attractions.

In each case, the individuals were answering yes or no. They were told that their response should reflect the likelihood that they would visit as a primary interest rather than trying to say whether they would visit or not visit for certain. Without this direction, they would answer yes to all items if given a chance to visit over time. The following table indicates what they would select on the first or only visit.

Would Visit?

	Yes	% of Yes	No	% of No
• Scenic park:	17	89.5	2	10.5
• Excellent interpretive centre:	15	78.9	4	21.1
• Family resort with adult and child activities:	14	73.7	5	26.3
• Ranch or farm:	13	68.4	6	31.6
• Lakeside or riverside cabins:	12	63.2	7	36.8
• Historic town or village:	12	63.2	7	36.8
• Sporting event (eg. rodeo, tournament):	11	57.9	8	42.1
• Campground/R.V. park:	9	47.4	10	52.6
• Excellent restaurant:	7	36.8	12	63.2
• Major festival:	7	36.8	12	63.2
• Friends and relatives:	7	36.8	12	63.2
• Interesting shopping area:	5	26.3	14	73.7
• Amusement park:	4	21.1	15	78.9

2.0.4 Interpretive Centres

The respondents were provided with a profile of information on four different interpretive sites.

A. Native Interpretive Centre

A park-like setting located just off the Trans-Canada Highway, near the entrance to the Rocky Mountains. On-site, there are two native encampments that appear just as they would have in 1870. There are regular re-enactments of sacred dances and rituals, and there is an opportunity to visit an interpretive centre, to purchase native crafts, and to eat modern versions of some native foods.

B. Western Heritage Centre

A major interpretive centre dedicated to the romance of cowboys, ranches and rodeo. Located on 150 acres of native prairie, on a scenic hillside next to the town of Cochrane. The centre includes a restaurant, a cafeteria, a gift shop with western crafts and souvenir products. The display area includes three dimensional display environments which you enter and in which you will meet historical and modern characters. The grounds offer trails, picnic areas and reconstructed historic ranch buildings. There are entertaining presentations about demonstrations for your enjoyment and education.

C. Alberta Historic Ranch (Bar-U)

A real historic ranch, one of the most famous ranches in southern Alberta. The actual ranch buildings have been restored, and everything is as it was in the

1880s. The site offers a panoramic vista of the prairies, the mountains and the foothills. Located 15 kilometres south of Longview, the ranch includes trails and picnic areas along a brook. There is an interpretive centre, a gift shop area and a good restaurant. Immediately next to the historic ranch is a working ranch where you can see real cowboys at work.

D. Hell's Half Acre Interpretive Centre

Located at Turner Valley, this is a restoration of the historic site where the Alberta oil boom began. The site is a historic gas plant that has been redeveloped into a fascinating environment for you to explore. There is a major interpretive centre offering state-of-the art electronic exhibits, and there are trails through the park with many interpretive displays and signs to inform and educate you about famous people and moments that made Alberta's oil and gas industry.

The respondents were asked to rank the four sites from the most preferred (1) to the least preferred (4). Ties were not allowed.

	Most Favourable			Least Favourable	Mean Score
• Western Heritage Centre	8	4	5	2	2.05
• Native Interpretive Centre	7	5	4	3	2.16
• Alberta Historic Ranch (Bar-U)	3	7	4	5	2.58
• Hell's Half Acre Interpretive Centre	1	3	6	9	3.21

It is important to note that there is very little difference between the Western Heritage Centre and the Native Interpretive Centre. The difference may be due to the small sample size. Both centres are in close proximity to the Trans-Canada Highway and both reflect similar historical perspectives.

2.0.5 Interesting Place to Visit

The respondents were asked whether they felt the foothills near Calgary were an interesting place to visit. The response pattern gave back much of what was asked in the earlier ranking question. There were virtually no new elements of information. The key items raised are offered as a summary.

Appealing

- Scenery
- Ranch country
- Old west
- Peaceful
- Relaxing
- Historic

- Good access
- Close to services

Not Appealing

- Limited in what one can see and do
- More options
- More services
- More variety in development

2.0.6 Conjoint Exercise

The respondents were asked to complete a conjoint ranking exercise. The strength of this technique is the development of insight into trade-offs that respondents make in their decision-making process. It works very well with a limited sample size.

The final output of the conjoint allows for the ranking of the components of the decision in terms of their relative importance in the decision. In addition, it is possible to develop the profile of the "ideal" product based on the respondent's trade-off rankings.

Conjoint

Factor	Weight
• Theme	.31
• Services and Activities On-Site	.28
• Location	.23
• Price	.18

These results indicate that the most important item to the user is the theme followed very closely by services, activities and location. It appears that price is not a major factor as long as the other criteria have been met. The ideal product as determined in the conjoint was as follows:

- Theme: Western Heritage Centre or Native Interpretive Centre
- Services and Activities: Activities and presentations on-site (not just displays)
- Location: Cochrane or Seebe
- Price: Medium ($5.00)

3.0 CONCLUSION

The focus group information provided initial rankings of important items in conducting a touring vacation in the foothills of Alberta. The data were provided in order of importance.

The ranking of four different venues was accomplished by forcing a specific ranking of preference. Respondents were not allowed to assign the same rank to more than one venue and they were not allowed to rank the item a zero.

The conjoint trade-off data provided further support for the information collected during the focus groups. The data appear to be quite internally consistent. This increases the level of confidence associated with the overall results. This is important when the database is developed from small samples.

POPULATION ESTIMATES

Population of Local and Secondary Market Areas

ZONE A - BOW VALLEY CORRIDOR

Cochrane	4 337
Ghost Lake	28
Seebe	134
Stoney IR no's 142,143,141A	1 226
Rural M.D. 44 (est. 25%)	4 371
Total Zone A	**10 096**

ZONE B - FOOTHILLS

Black Diamond	1 481
Bragg Creek	498
Hartell	17
Longview	286
Naptha	18
Turner Valley	1 317
Rural M.D. 31 (est. 40%)	3 759
Eden Valley IR no. 216	432
Total Zone B	**7 808**

ZONE C - HIGHWAY 2

Cayley	216
High River	9 893
Nanton	1 564
Okotoks	6 020
Rural M.D. 31 (est. 30%)	2 819
Total Zone C	**20 512**

POPULATION OF 3 HOUR DRIVING CIRCLE

Medicine Hat and Area	51 797
Lethbridge and Area	112 739
Fort MacLeod - Pincher Creek	34 970
Hanna - Oyen	9 622
Drumheller - Vulcan	38 805
Calgary and Area	715 605
Stettler - Hardisty and Area	25 739
Rocky Mountain House and Area	15 999
Banff - Canmore and Area	18 867
Wetaskiwin and Area	22 039
Camrose and Area	22 815
Leduc and Area	37 037
Stony Plain - Drayton Valley and Area	50 015
Edmonton	771 000*
Total:	**1 926 869**

Source: Alberta Bureau of Statistics 1986
[* 1988 Estimate (City of Edmonton)]

VISITOR CHARACTERISTICS AND TRAVEL PATTERNS

Non-Resident Visitors to the Study Area

ORIGIN OF VISITORS TO THE STUDY AREA (1982)	All Visits		Area MainAB Destination		Overnight in Area	
	Zone		*Zone*		*Zone*	
	A	*B & C*	*A*	*B & C*	*A*	*B & C*
Canada						
• British Columbia	29	31	36	47	32	25
• Saskatchewan	12	11	14	10	13	15
• Manitoba	9	6	11	9	9	10
• Ontario	12	6	14	3	14	6
• Quebec	2	1	3	*	3	*
• Atlantic Provinces	1	1	2	1	2	1
• Yukon	*	*	*	*	*	*
• Northwest Territories	1	*	1	1	1	1
Canada Total	66	55	79	69	72	59
United States	27	42	16	30	21	39
International	7	3	5	3	7	3

Source: Alberta Travel Survey, 1982

PRIMARY TRIP PURPOSE

Most visitors to the Bow Valley (Zone A) were visiting friends or relatives (36%) or on vacation (35%). Business travel accounted for twenty-three percent of the visitors.

Fewer visitors to Zones B and C were on business trips (13%). Visiting friends/relatives and vacationing remained the primary purpose of most travellers, accounting for thirty-two and twenty-eight percent of the visitors respectively.

Source: Canadian Travel Survey, 1986

LISTED ACTIVITIES OF STUDY AREA VISITORS (1982)

ACTIVITY	All Visits to Area		Area Main AB Destination		Overnight in Area	
	ZONE		ZONE		ZONE	
	A	B & C	A	B & C	A	B & C
• Sightseeing	69%	67%	59%	50%	64%	67%
• Visiting	57	46	67	57	53	52
• Relaxing	45	41	41	34	43	43
• Shopping	33	32	32	40	35	31
• Camping	27	32	18	20	24	34
• Museums	30	30	25	24	30	29
• Picnicking	19	19	15	16	17	20
• Special Events	15	15	15	16	15	16
• Sporting Activities (all)	59	54	42	54	54	57
• Hiking/Backpacking	12	12	6	5	10	10

Source: Alberta Travel Survey, 1982

TRAFFIC PATTERNS

AADT and ASDT Figures for Selected Locations in the Study Area

(Two Way Traffic Volumes)

LOCATION	1987		1988	
	AADT	AAST	AADT	AAST
• ***Highway 1***				
1.5 km W of 1 and 22	10 290	12 700	11 910	14 720
• ***Highway 1A***				
1.5 km E of 1A and 22	5 000	5 540	5 150	5 620
1.4 km W of 1A and 22	1 810	2 100	2 200	2 630
• ***Highway 2***				
3.1 km N 2 and 533 Nanton	5 160	6 050	5 670	6 330
8.3 km S 2 and 22 Y DeWinton	-	-	15 610	17 630
• ***Highway 2A***				
6 km N 2A and 7 intersection	7 170	7 530	7 330	8 030
• ***Highway 8***				
1 km E 8 and 22	2 890	3 350	3 080	3 610
• ***Highway 22***				
.8 km S 8 and 22	3 590	4 160	3 730	4 370
2.8 km N 1 and 22 Cochrane	3 170	3 620	3 400	3 910

Source: Alberta Transportation and Utilities
Traffic Information Services

AADT = Average Annual Daily Traffic ASDT = Average Summer Daily Traffic

VEHICLE TYPE STATISTICS (1988)

LOCATION	Traffic Volume		Vehicle Class (%)			
	AADT	ASDT	Pass.	Rec.	Bus.	Truck
• **Highway 1**						
E of 40 E of Seebe*	10 990	13 580	78.4	11.8	1.3	8.4
• **Highway 1A**						
W of 22 at Cochrane	2 230	2 490	86.5	6.3	1.0	6.2
• **Highway 2**						
N of 533 S of Nanton	5 320	6 350	72.5	3.6	1.0	23.0
• **Highway 2A**						
N of 543 N of High River	2 430	2 620	81.2	0.5	1.6	16.6
• **Highway 7**						
E of 22 at Black Diamond	2 190	2 390	90.0	0.8	1.4	7.9
• **Highway 22**						
NE of 549 SE of Millarville	2 040	1 780	87.8	3.8	1.6	8.8
S of 1A at Cochrane*	2 240	2 570	79.4	9.5	0.4	10.7

*** 1987 Figures**

Source: Alberta Transportation and Utilities
Traffic Information Services

AADT = Average Annual Daily Traffic

ASDT = Average Summer Daily Traffic

CAMPING AND DAY USE OF PROVINCIAL PARK FACILITIES

Park User Stats, Peak Season (April 15 - September 15)

DAY USE *(PARK)*	**1988** (# of parties)	**1989** (# of parties)
• Bragg Creek	46 707	52 632
• Bow Valley Campground/ Willow Rock Campground	45 286	42 406
OVERNIGHT *(PARK)*		
• Bow Valley Campground	24 045	23 175
• Willow Rock Campground	11 076	15 120

PRIMARY PLACE OF RESIDENCE FOR CAMPING PARTIES

BOW VALLEY P.P. (1986)

	%
• Calgary	61.2
• Other Alberta	11.7
• United States	10.1
• Other (Can. & Int'l.)	6.3
• Edmonton	6.1
• British Columbia	4.6

• Most visitors travel between .5 & 1.5 hours to Provincial Parks in the study area.

Source: Alberta Recreation and Parks

SCHOOL ENROLMENT

ZONE A:	
• Rocky View S.D. (6 schools):	2 028
ZONE B:	
• Foothills S.D. (7 schools):	953
• Willow Creek S.D. (2 schools):	470
ZONE C:	
• Foothills S.D. (1 school/:	387
8 schools):	2 389
TOTAL ENROLMENT:	3 838

Source: Alberta Department of Education
Personal Correspondence

APPENDIX 2:

Regional Services & Events

CAMPGROUND PARK FACILITIES AND THEIR USE

ZONE A	# of Sites
Bow Valley Campground (P.P.)*:	137
Cochrane Municipal Campground (M):	12
Ghost Reservoir Rec. Area (P.P.):	46
KOA Calgary (P.O.):	224
Lakeside Park and Campground (P.P.):	56
Sibbald Lake (P.P.):	134
Stoney Indian Park (P.O.):	55
Sunalta (P.O.):	315
Willow Rock Campground (P.P.):	109
Total Zone A:	***1 088***

ZONE B	# of Sites
Black Diamond Centennial Park (M):	24
Highwood Campground (A.T.):	28
Hell's Half Acre Campground (M):	18
Total Zone B:	***70***

ZONE C	# of Sites
Archie Hogg Park (M):	50
George Lane Memorial Park (M):	56
Nanton Campground (A.T.):	20
Okotoks Lions Sheep River Campground (C.L.):	43
Okotoks Wilderness Campground (P.O.):	106
River Bend Campground (P.O.):	173
Total Zone C:	***448***

TOTAL SITES IN AREA: ***1 606***

[* P.O. = Private Operator; P.P. = Provincial Park; M = Municipal;
A.T. = Transportation; CL = Service Club]

ACCOMMODATION

NAME	UNITS	EXTRAS	RATING
Zone A:			
Bragg Creek Cabin Rental	3	Restaurant	3
Nakoda Lodge	50	Restaurant; Conference Area; Pool	1
Zone B:			
Twin Cities Hotel	N/A	Longview Bar is Regionally Famous	N/A
Triple "A" Motel	20	None	3
Turner Valley Inn	27	Licensed Restaurant; Pub	3
Zone C:			
Foothills Motel	21		3
Heritage Inn	42	Licenced Restaurant; Pub	3
High River Motor Motel	22		3
Mid-Way Motel	18		3
Ranchland Inn	26		3
Okotoks	15		3

Source: Equus Consulting Group

* **Ratings**: ***Accommodations were categorized on the basis of a review of accommodation listings.***

3 = *Basic overnight accommodation only; amenities are limited to a general restaurant*

2 = *Accommodation accompanied by attractive amenities such as recreation facilities, specialty restaurant, deluxe decor*

1 = *Deluxe accommodation accompanied by on-site recreation amenities; regionally significant views and/or architecture, usually with attractive grounds*

RESTAURANTS

ZONE	*OUTLETS*	*SPECIALTY RESTAURANTS*	*TOTALS*
A	14	3	17
B	16	2	18
C	31	4	35

There are a total of 61 restaurants in the study area. Thirty-one (51%) of the restaurants are located in the Highway #2 corridor. While all of the restaurants serve a specific tourist market, only nine (15%) of the restaurants offer specialized menus. The specialized restaurants include tea houses, fine dining establishments, and specialty shops. The Chief Chiniki Restaurant is the only facility focussing specifically on the tourism industry. The remaining fifty-two (85%) restaurants include fast food, casual dining, and take-out services. They offer standard menus and cater to local needs.

Source: Equus Consulting Group

LOCAL EVENTS AND SPORTS TOURNAMENTS

ZONE A

- 8 - 10 hockey tournaments
- 4 curling bonspiels
- 4 ball tournaments

ZONE B

- Little New York Daze
- Millarville Races
- 2 - 3 curling bonspiels
- Gliding Club and Air Field
- Black Diamond Christmas Breakfast

ZONE C

- Foothills Fine Arts Show
- Okotoks Sports Day
- Okotoks Summer Festival
- Annual Figure Skating Carnival
- 20 - 25 hockey tournaments
- Nanton Casino
- Okotoks Winter Festival
- 12 - 15 curling bonspiels
- Nanton Night Rodeo
- 15 - 17 ball tournaments

Source: Personal Interviews with Recreation Co-ordinators

APPENDIX 3:

Community & Personal Contacts

COMMUNITY AND PROVINCIAL GOVERNMENT CONTACTS

1) ***Peter Breedreld***
Alberta Tourism
Edmonton, Alberta

2) ***Beverly Darbyshire***
Alberta Tourism
Edmonton, Alberta

3) ***Cathy Dumaresques***
Alberta Tourism
Edmonton, Alberta

4) ***Brian Braidwood***
Alberta Recreation & Parks
Edmonton, Alberta

5) ***Roy Finzell***
Alberta Recreation & Parks
Edmonton, Alberta

6) ***Joel Christensen***
Alberta Recreation & Parks
Kananaskis Country
Calgary, Alberta

7) ***Peter Lee***
Alberta Forestry, Lands & Wildlife
Edmonton, Alberta

8) ***Barb Danielson***
Alberta Forestry, Lands & Wildlife
Fish & Wildlife Division
Calgary, Alberta

9) ***Janice Fong***
Alberta Transportation
Edmonton, Alberta

10) ***Brian Ronaghan***
Alberta Culture & Multiculturalism
Calgary, Alberta

11) ***Don Galloway***
Alberta Education
Edmonton, Alberta

12) ***K. Thompson***
Black Diamond Ranch Rodeo Assn.
Black Diamond, Alberta

13) ***Sarcee Recreation Department***
Bragg Creek, Alberta

14) ***Don King***
Museum at the Highwoods
High River, Alberta

15) ***Ev Doherty***
Former Chairperson
Community Futures Committee
High River, Alberta

16) ***John Parker***
Economic Development Council
High River, Alberta

17) ***Glenda Cutforth***
High River Tourism
High River, Alberta

18) ***Doug Lyons***
Alberta Bed & Breakfast Bureau
Calgary, Alberta

19) ***Marg Frazer***
High River Chamber of Commerce
High River, Alberta

20) ***Heather Aiken***
High River Cultural Centre
High River, Alberta

21) *Karen Kitchen*
Administrator
Town of Nanton
Nanton, Alberta

22) *Tom Hornecker*
Nanton Area Complex
Nanton, Alberta

23) *Dan Wisniuk*
Nanton Chamber of Commerce
Nanton, Alberta

24) *Howard Vickers*
Nanton Golf Club
Nanton, Alberta

25) *Barb Lyle*
Nanton Tourist Information Centres
Nanton, Alberta

26) *Duncan Kesselring*
Turner Valley Golf Club
Turner Valley, Alberta

27) *Kim Wilkowitch*
Highwood Golf Club
High River, Alberta

28) *Louise Sherran*
Alberta Snowmobile Assn.
Edmonton, Alberta

29) *Dianne Kreh*
Town Office
Black Diamond, Alberta

30) *Lauri Taylor*
Town Office
Turner Valley, Alberta

31) *Glenice Curry*
Black Diamond Parade
Black Diamond, Alberta

32) *Maureen Arnold*
Cochrane Chamber of Commerce
Cochrane, Alberta

33) *Allan Hall*
Cochrane Rodeo Assn.
Cochrane, Alberta

34) *Lynn Thompson*
Cochrane Tourism Assn.
Cochrane, Alberta

35) *Tim Ward*
Okotoks Community Services
Okotoks, Alberta

36) *Dr. Grant Hill*
Okotoks Antique Car Auction
Okotoks, Alberta

37) *Jim Anderson*
Cochrane Recreation Director
Cochrane, Alberta

38) *Shirley Begg*
Studio West Bronze Factory
Cochrane, Alberta

39) *Al Hardstaff*
Alberta Snowmobile Assn.
Edmonton, Alberta

40) *Randy Fedorick*
Spruce Meadows Stables
Calgary, Alberta

41) *Cathy Hale*
Calloway Park
Calgary, Alberta

42) *Rudy Enzman*
Bronze Boot Art Gallery
High River, Alberta

43) ***Janice Stomp***
Cochrane Ranche Historic Site
Cochrane, Alberta

44) ***Dave Birrell***
Nanton Lancaster Bomber &
Air Museum
Nanton, Alberta

45) ***Longview Village Office***
Longview, Alberta

46) ***Alan McRoberts***
Alberta Hostel Assn.
Calgary, Alberta

47) ***Randy Smith***
General Manager
Chinook Country Tourist Assn.
Lethbridge, Alberta

48) ***Lynne Cartwright***
Bar U Ranch Historical Society
Turner Valley, Alberta

49) ***M.R. (Mac) Makenny***
Homeplace Ranch
Priddis, Alberta

50) ***Omar Broughton***
Bar U Ranch Historical Society
Turner Valley, Alberta

51) ***Leo Kyllo***
Leo Kyllo & Associates Ltd.
Calgary, Alberta

52) ***Robert Drake***
Calgary Tourism & Convention
Bureau
Calgary, Alberta

53) ***Max Gibb***
Maximum West Ranch Club
Millarville, Alberta

54) ***Tony Maxwell***
David Thompson Country
Tourism Assn.
Red Deer, Alberta

55) ***Steve Gundry***
Western Heritage Centre
Cochrane, Alberta

56) ***Jim Younker***
Wintergreen Resort
Bragg Creek, Alberta

57) ***Stan Cowley***
Rafter Six Guest Ranch
Seebe, Alberta

58) ***Paul Pakox***
Manager
Nakoda Lodge
Morley, Alberta

59) ***Town Office***
Cochrane, Alberta

60) ***Harry R. Cambrin***
M.D. of Foothills
Calgary, Alberta

61) ***Graham Smith***
M.D. of Rocky View
Exshaw, Alberta

62) ***Ron Hood***
Priddis Green Golf Course
Calgary, Alberta

63) ***Bev Therenson***
Calloway Park
Calgary, Alberta

64) ***Pro Shop***
Redwood Meadows Golf &
Country Club
Bragg Creek, Alberta

65) ***Stan Schwartzenberger***
Economic Development Coordinator
Cochrane, Alberta

66) ***Peter L. Wesley***
Assistant Band Manager
Stoney Tribe
Bearspaw Band
Morley, Alberta

67) ***Donna Hogeland***
Stoney Tribe
Bearspaw Band
Morley, Alberta

68) ***Ray Greenwood***
Economic Development Manager
Stoney Tribe
Chiniki Band
Morley, Alberta

69) ***Happy Techentin***
Assistant Manager
Nakoda Lodge
Stoney Tribe
Wesley Band
Morley, Alberta

70) ***Roger Watanamuk***
Stoney Tribe
Eden Valley Band
Longview, Alberta

71) ***Ken Tully***
Resources Consultant
Stoney Tribe
Goodstoney Band
Morley, Alberta

72) ***Farley Wuth***
Stoney Tribe
Goodstoney Band
Morley, Alberta

73) ***Daniel Crane***
T'suu T'ina (Sarcee) Nation
Calgary, Alberta

74) ***Deborah Bakowich***
T'suu T'ina (Sarcee) Nation
Calgary, Alberta

75) ***Ian Getty***
Research Director
Nakoda Institute
Stoney Tribe
Wesley Band
Morley, Alberta

76) ***Jack Tully***
Administrator
Stoney Tribe
Goodstoney Tribe
Morley, Alberta

APPENDIX 4:

Community Tourism Action Plan Priorities

APPENDIX 4: Top Ten Community Tourism Action Plan Priority Objectives *(By Community)*

COMMUNITY/TOURISM OBJECTIVES OF:	TO IMPROVE TOURISM ATTRACTIONS	TO IMPROVE TOURISM PROMOTION	TO IMPROVE TOURISM INFRASTRUCTURE	TO IMPROVE TOURISM HOSPITALITY	TO IMPROVE TOURISM SERVICES
Municipal District of Rocky View #44	• To ensure high quality tourism developments • To encourage the upgrading of tourism attractions/events • To encourage attractions & events to utilize identified theme • To encourage completion of proposed tourism development projects • To identify & preserve historical sites/monuments • To identify potential tourism destination areas	• To investigate benefits of membership in tourism zone • To develop a municipal theme • To produce a municipal tourism brochure and encourage the private sector to do same • To produce a placemat map highlighting tourism attractions	• To improve directional & informational signing to facilities/services • To encourage Economic Development Committee to become more active	• To improve resident & merchant awareness of benefits of tourism • To improve ability of frontline staff & management through training	
Municipal District of Bighorn #8	• To identify sources of assistance for tourism operators • To develop attractions & improve promotions	• To produce and use a tourism marketing strategy • To co-operate with & encourage membership in tourism zone association • To provide a tourism theme to improve co-operation & co-ordination among merchants, groups and services • To provide more "lure" signs			
T'suu T'ina (Sarcee) Nation		• To prepare information & tour packages • To develop an overall marketing strategy	• To develop an information centre/system • To improve signs in & around Sarcee reserve	• To inform band members of benefits of tourism • To develop Sarcee human resources for the tourism industry • To broaden Sarcees' status and awareness among outside community • To develop a plan for volunteer recognition & participation • To produce a strategy for youth involvement	• To encourage the development & support of small business

Source: Equus Consulting Group

APPENDIX 4 (Con't): Top Ten Community Tourism Action Plan Priority Objectives *(By Community)*

COMMUNITY/TOURISM OBJECTIVES OF:	TO IMPROVE TOURISM ATTRACTIONS	TO IMPROVE TOURISM PROMOTION	TO IMPROVE TOURISM INFRASTRUCTURE	TO IMPROVE TOURISM HOSPITALITY	TO IMPROVE TOURISM SERVICES
Chief Jacob Bearspaw Stoney Indian Band	• To make Bearspaw Band buffalo more accessible to tourists • To explore the feasibility of development at Chiniki Lake • To organize a Bearspaw Summer pow-wow • To develop an interpretive facility / program for Stoney history & culture • To clean up cemetary and construct a monument for the Chief Jacob Bearspaw gravesite		• To explore the feasibility of constructing better tourist access to Chiniki Lake • To construct better tourist access to the Bow and Kananaskis Rivers		• To establish a storefront for Bearspaw handicrafts • To construct a campground along the Kananaskis River • To encourage more handicraft production
Goodstoney Indian Band	• To provide an improved feasibility for the Nakoda Institute Cultural Centre	• To develop and deliver a tour package which provides native cultural awareness • To maintain membership and liaison with tourism zones and Alberta Tourism Education Council	• To develop recreational (hiking & interpretive) trails • To develop facilities for wilderness guide expeditions • To develop staff housing for Nakoda Lodge.	• To develop hospitality & cultural guide interpretive training packages	• To establish a wilderness guide program • To establish a coffee stop / restaurant at Nakoda Lodge • To develop handicrafts & make available to tourists
Town of Black Diamond	• To make the Sheep River safe and aesthetically pleasing for tourists • To develop an area rest stop • To examine the possibility of developing the natural beaver pond habitat into a tourist attraction	• To explore the potential to establish a tourist information centre in Black Diamond • To provide maps identifying local attractions and services • To explore development & production of promotional materials & souvenirs	• To build public washrooms accessible to tourists • To construct a downtown parking facility • To explore demand & funding for a stage for performances in campground • To contribute to upgrading of friendship trail		

Source: Equus Consulting Group

APPENDIX 4 (Con't): Top Ten Community Tourism Action Plan Priority Objectives *(By Community)*

COMMUNITY TOURISM OBJECTIVES OF:	TO IMPROVE TOURISM ATTRACTIONS	TO IMPROVE TOURISM PROMOTION	TO IMPROVE TOURISM INFRASTRUCTURE	TO IMPROVE TOURISM HOSPITALITY	TO IMPROVE TOURISM SERVICES
Town of High River	• To develop an image and/or theme for High River • To develop tours in High River and area • To improve the interest & understanding of High River Historical Railway Association and assist in its development	• To improve signs in town & on highway approaches • To encourage co-ordination, co-operation, & timing of promotional efforts among groups & events • To encourage spectators at rodeo grounds to go into High River	• To encourage provision of adequate lighting at Highway 2 & 23 overpass • To find solution for problems facing downtown core	• To encourage tourism awareness among residents	• To increase utilization of existing facilities
Town of Nanton	• To identify a tourism theme to be used in attractions & promotion • To support the development of a major tourism attraction (Nanton Lancaster Bomber) • To support the re-establishment of the Nanton TAP	• To improve the promotional ("lure") signs for the town • To develop and promote circle tours in the area • To improve co-ordination of promotion among area merchants, special events & attractions		• To support additional training of tourism information centre staff about attractions & services • To improve the knowledge, hospitality, awareness of tourism & tourists among residents, especially merchants • To improve written information about the towns attractions and services	• To improve the directional & information signs in the area
Town of Okotoks	• To enhance existing activities and events and to develop complimentary activities/events • To support the development of a tourism oriented "mainstreet" project for Okotoks • To identify potential major tourism attractions, activities or events for the town of Okotoks	• To encourage the organization of an Okotoks tourism association • To improve the operation of the tourist information booth		• To develop policies for the general development of tourism for the town of Okotoks • To inform the business community & other eligible groups of available tourism funding • To foster tourism awareness programs with the community	• To encourage private sector development and promotion of campgrounds and auxillary services • To encourage the development of accommodation and meeting facilities

Source: Equus Consulting Group

APPENDIX 5:

Inventory of Attractions & Events

ZONE A

The Bow Valley Between Calgary and Seebe

TOURIST ATTRACTION: Cochrane Ranche Provincial Historic Site
Located on the northeast border of the town of Cochrane.

1. **VISITATION - #'S, length of stay**: 1985 - 15,500; 1987 - 22,088; 1988 - 33,588; 1989 - 31,559

2. **MARKET - origin, segments**: According to 1988 Rasmussen Survey: 84% Albertan, 17% Canadian, 14% International

3. **HOW LONG IN OPERATION**: Ranche opened in 1979, visitor centre opened in 1980.

4. **CURRENT PLANS - changes, marketing initiatives**: Marketed on several levels: through local events and media, travel shows, provincial communications branch.

5. **YEAR ROUND/SEASONAL/EVENT**: Seasonal

6. **PLANS, BROCHURES, DESCRIPTIONS**: Brochures available through Alberta Culture.

7. **OTHER OBSERVATIONS**: Has witnessed a significant increase since early 1980's.

   Olympics had a significant effect on visitations.

   History and environmental connections begin to draw more people -perhaps a sense of nostalgia has kindled the desire to visit the ranch.

TOURIST ATTRACTION: Cochrane Horse & Carriage Rally - Square Dance Festival

1. **VISITATION - #'s, length of stay**: 400 - 500 dancers; 1,000 + spectators/participants

2. **MARKET - origin, segments**: 90 percent of dancers from outside region; 60 percent of spectators from outside region.

3. **HOW LONG IN OPERATION**: First year

4. **CURRENT PLANS - changes, marketing initiatives**: Advertise throughout the "Western Horse Territory" - Northwest States, B.C., Sask., Alta.

5. **YEAR ROUND/SEASONAL/EVENT**: Event

6. **PLANS, BROCHURES, DESCRIPTIONS**: No

7. **OTHER OBSERVATIONS**: This year the square dance festival was a provincial convention that had a great impact on the town -
   restaurants ran out of food; no place to park R.V.'s.
   (Despite having planned for the convention.)

   Don't expect the same size of crowds next year but do see this event as a tourist attraction in the future.

TOURIST ATTRACTION: Cochrane Ranchland Frolic Days & Parade

1. **VISITATION - #'s, length of stay**: 1,000 - 1,500 people over the two day event.
2. **MARKET - origin, segments**: 50 percent from Cochrane; 50 percent from Calgary and area; most participants/spectators are family units.
3. **HOW LONG IN OPERATION**: Approximately 20 years
4. **CURRENT PLANS - changes, marketing initiatives**: Add street performers next year in hopes to draw larger crowds, particularly from Calgary.
5. **YEAR ROUND/SEASONAL/EVENT**: Event
6. **PLANS, BROCHURES, DESCRIPTIONS**: None other than a brochure put out by the Cochrane business group.
7. **OTHER OBSERVATIONS**: Plan to work through Calgary, and Team Tourism to increase the advertising.

   Has been gaining popularity over the years.

TOURIST ATTRACTION: Cochrane Rodeo
An amateur rodeo held in Cochrane on a yearly basis.

1. **VISITATION - #'s, length of stay**: Approximately 6000 over three days
2. **MARKET - origin, segments**: Draw in half of the spectators from the city of Calgary and half from the Cochrane region. Families comprise the larger portion of people attending.
3. **HOW LONG IN OPERATION**: 22 years
4. **CURRENT PLANS - changes, marketing initiatives**: Make a greater push to advertise the event through Calgary media primarily through two radio stations.
5. **YEAR ROUND/SEASONAL/EVENT**: Event
6. **PLANS, BROCHURES, DESCRIPTIONS: N/A**
7. **OTHER OBSERVATIONS**: Started to break even during the last two years; attributed to the increased advertising.

   Organized in conjunction with Frolic Days.

TOURIST ATTRACTION: Kananaskis Guest Ranch

1. VISITATION - #'s, length of stay: approximately 6,000 guest - nights annually; more than 50 percent (55 - 60 percent) are from outside Alberta.

2. MARKET - origin, segments: Alberta - 40 percent; national/international (in order): (1) U.S.; (2) Europe; (3) Western Canada; (4) Eastern Canada; (5) Japan.

3. HOW LONG IN OPERATION: 50 + years

4. CURRENT PLANS - changes, marketing initiatives: Have recently upgraded and expanded accommodation and meeting component. Are adding an eighteen hole golf course. Are currently engaged in a marketing program with support from the C/ATA.

5. YEAR ROUND/SEASONAL/EVENT: Year round, major season is May through October.

6. PLANS, BROCHURES, DESCRIPTIONS: brochure to be sent

7. OTHER OBSERVATIONS: Has a long history and good reputation as a tourist guest ranch destination in the foothills of the Rocky Mountains.

TOURIST ATTRACTION: Studio West Bronze Factory
A bronze foundry and art gallery located in Cochrane.

1. VISITATION - #'S, length of stay: Approximately 2,400 per year; visit over a two hour period.

2. MARKET - origin, segments: 50 percent from Calgary; 25 percent from province; 25 percent out of province.

3. HOW LONG IN OPERATION: 18 years - tours started in 1975.

4. CURRENT PLANS - changes, marketing initiatives: word of mouth; listed in David Thompson Guide Book

5. YEAR ROUND/SEASONAL/EVENT: Year round

6. PLANS, BROCHURES, DESCRIPTIONS: No

7. OTHER OBSERVATIONS: Have received visiting groups from Scotland, Japan, Bangladesh.

   Improved directional signs would increase visitation.

TOURIST ATTRACTION: Rafter 6 Guest Ranch - Seebe, Alberta

1. **VISITATION - #'s, length of stay:** 12,000 visitors overnight during season; 138,000 visitors for day trips (primarily bus tour visits - 2-3 buses at lunchtime, and 10 - 15 buses at dinnertime).

2. **MARKET - origin, segments:** 75 percent of clientele is international;

   1. U.S.;
   2. Germany;
   3. Japanese;
   4. other European
   - 25 percent is provincial/national.

3. **HOW LONG IN OPERATION:** 10 + years

4. **CURRENT PLANS - changes, marketing initiatives:** None. Continue to target the fly/drive market and accommodate tour operators.

5. **YEAR ROUND/SEASONAL/EVENT:** Open May 1 - October 31, annually. 184 days.

6. **PLANS, BROCHURES, DESCRIPTIONS:** Brochures available (to be sent).

7. **OTHER OBSERVATIONS:** Visited Rafter 6 on October 5, 1989. The facility appeared to be close to fully occupied. Stan indicated that during the operating season they are close to 100 percent occupancy (can accommodate 60 people per night). Will package:

   - trail rides;
   - white-water rafting;
   - heliskiing;
   - fishing;
   - mountain climbing;
   - golfing;
   - offers package programs for conventions, senior citizens and groups.

TOURIST ATTRACTION: Nakoda Lodge - Good Stoney Reserve

Contact: Paul Pakox, Manager

1. **VISITATION** - #'s, length of stay: one - three days; sleeping room occupancy has been in the 40 percent range over last eight months (ie. 8,000 - 10,000 visitors)
2. **MARKET** - origin, segments: Aim at conference/convention markets (winter, spring, autumn) and pass by traffic (summer). Source of market is - native people in western Canada, city of Calgary conference market. Are aiming at bus tours; will take two years to establish.
3. **HOW LONG IN OPERATION**: Nakoda Lodge - conference centre eight years in operation; Nakoda Lodge - accommodation eight months.
4. **CURRENT PLANS** - changes, marketing initiatives: Are working with CTCB and Alberta Tourism to develop a marketing and promotional strategy strated hotel season with no promotional budget.
5. **YEAR ROUND/SEASONAL/EVENT**: Year round
6. **PLANS, BROCHURES, DESCRIPTIONS**: Being developed in conjunction with marketing/promotion strategy.
7. **OTHER OBSERVATIONS**: Dining room can accommodate 300 people
   - Have three meeting rooms to accommodate approximately 100 people
   - Can convert portion of the dining room for meetings
   - Has swimming pool
   - Have 50 sleeping rooms - can accommodate 100 people
   - Chief John Snow conceived the development and is Chairman of the Board
   - Totally owned and operated by the Good Stoney Band
   - There is a "native resource centre" onsite, including audio-visual materials and a reference library, not aggressively pursuing a "live" native presentation or interpretive concepts
   - The reserve is "dry" - so is Nakoda Lodge

TOURIST ATTRACTION: Calaway Park
Amusement park west of Calgary on the Trans-Canada Highway.
*Requested access to the final report.

1. **VISITATION** - #'s, length of stay: Have averaged approximately 320 000 visitors/year over the last three years.
2. **MARKET** - origin, segments: 50 percent from local market area; 50 percent from a combination of Alberta, Saskatchewan, interior B.C. and northern Montana.
3. **HOW LONG IN OPERATION**: 8th year just completed
4. **CURRENT PLANS** - changes, marketing initiatives: Planning to enhance marketing outside alberta - promote the park in Saskatchewan, B.C. and Montana.

   Current marketing initiatives include the use of television, radio and written media. Most of their budget is committed to television and radio.
5. **YEAR ROUND/SEASONAL/EVENT**: Seasonal
6. **PLANS, BROCHURES, DESCRIPTIONS**: Sending media package.
7. **OTHER OBSERVATIONS**: Believes the province should make better use of existing tourism facilities rather than attempting to create new facilities in a scattered fashion throughout the province.

   Must move outside Alberta to increase their market.

   Attendance peaked in 1984 - since then, the market has stabilized.

   Have not undertaken any research during the last two years.

ZONE B

The Foothills Southwest of Calgary, Including Bragg Creek, Turner Valley, and Longview

TOURIST ATTRACTION: Black Diamond Annual Parade
Held first Saturday in June.

1. **VISITATION - #'S, length of stay**: 600 participants and 1,500 spectators.

2. **MARKET - origin, segments**: 1,200 spectators come from local area; all bands come from Calgary; displays from entire southwestern Alberta.

3. **HOW LONG IN OPERATION**: 20 + years

4. **CURRENT PLANS - changes, marketing initiatives**: Plan to host other activities in conjunction with parade since Rodeo has folded (ie. street performers and amusement park); local and Calgary media.

5. **YEAR ROUND/SEASONAL/EVENT**: Event

6. **PLANS, BROCHURES, DESCRIPTIONS**:

7. **OTHER OBSERVATIONS**: One of the largest rural parades in Alberta.

   Though the Black Diamond Rodeo would attract approximately 6,000 - 10,000 people, the lack of rodeo did not significantly affect the parade attendance.

   Has been gaining popularity over the years.

TOURIST ATTRACTION: High Country Bed & Breakfast Bureau
This is a group of 11 independent B & B organizations scattered throughout the foothills area of southwestern Alberta.

1. **VISITATION - #'S, length of stay**: No central figures available for # of visitors; 90 percent of visitors stay over one night.

2. **MARKET - origin, segments**: 50 percent families; 50 percent singles; 75 - 80 percent from outside Alberta.

3. **HOW LONG IN OPERATION**: Bureau operating for two years; private B & B operating for four years.

4. **CURRENT PLANS - changes, marketing initiatives**: First year in the Alberta Tourism Guide.

5. **YEAR ROUND/SEASONAL/EVENT**: Seasonal - though occasional visitor in winter months.

6. **PLANS, BROCHURES, DESCRIPTIONS**: 1989 - 12,000 brochures printed; 1990 - 24,000 brochures. Having brochures printed in German and distributed through the consulate general.

7. **OTHER OBSERVATIONS**: Have seen a steady increase in number of families offering the service and clients.(1988 - 7 participating families; 1989 - 11 participating families; 1990 - 14 projected participating families.)

   Major market is international and eastern Canada.

   Additional services available: (1) trail rides; (2) supper available.

   Need greater communication between B & B associations in Alberta and Canada.

TOURIST ATTRACTION: Homeplace Ranch and Trail Rides

1. **VISITATION - #'S, length of stay:** 410 overnights; 87 guests on trail rides.

2. **MARKET - origin, segments:** 30 percent Albertan; 20 percent Canadian; 20 percent U.S.A. (California, N.Y.); 20 percent Europe (Germany, Italy, Austria); 5 percent Japan; 5 percent other (Australia, New Zealand).

3. **HOW LONG IN OPERATION:**

4. **CURRENT PLANS - changes, marketing initiatives:**

5. **YEAR ROUND/SEASONAL/EVENT:** Year Ranch; Seasonal Trail

6. **PLANS, BROCHURES, DESCRIPTIONS:** Has a brochure on guest ranch.

7. **OTHER OBSERVATIONS:** Trail riding: (1) consumer shows (2) direct mail (3) print media (4) co-op efforts (5) Olympic advertisement

   Film shows; slide shows; school presentations.

TOURIST ATTRACTION: Kananaskis 100 Relay Race

One day relay race beginning in Longview and proceeding through Kananaskis country.

1. **VISITATION - #'S, length of stay:** 2,000 - 3,000; many stay over one night in Longview area.

2. **MARKET - origin, segments:** Participants from Alberta, B.C., Saskatchewan; 96 percent of the participants are from outside the area.

3. **HOW LONG IN OPERATION:** Three years

4. **CURRENT PLANS - changes, marketing initiatives:** Advertise through running newsletters/magazines, direct mail outs, corporate sponsors.

5. **YEAR ROUND/SEASONAL/EVENT:** Event

6. **PLANS, BROCHURES, DESCRIPTIONS:** Brochure on the race.

7. **OTHER OBSERVATIONS:** Village of Longview puts on a pancake breakfast for the runners which attracts approximately 300 - 400 people.

   Impact is significant on the Longview area merchants and businesses (ie. race officials book all rooms in the Longview Hotel, many runners camp in local campground, B & B have noted increased business).

   Event is organized by the Alberta Hostel Association.

TOURIST ATTRACTION: Priddis Greens

1. VISITATION - #'s, length of stay: Memberships locked in at 600.

2. MARKET - origin, segments: 95 percent from Calgary; 5 percent from surrounding area.

3. HOW LONG IN OPERATION: Since 1984.

4. CURRENT PLANS - changes, marketing initiatives: Increasing the golf course to 27 holes.

5. YEAR ROUND/SEASONAL/EVENT: Seasonal

6. PLANS, BROCHURES, DESCRIPTIONS:

7. OTHER OBSERVATIONS: The condominiums are owned extensively by people/families commuting to Calgary to work.

   Don't see their facility as a regional tourism attraction because of its private nature.

   90 condo units existing. These condo's were sold in two years.

   An additional 30 units are proposed.

   Nine new holes currently under construction.

TOURIST ATTRACTION: Redwood Classic Golf Tournaments

An Indian golf tournament held in conjunction with the Indian Rodeo held on the Sarcee Indian Reserve near Morley.

1. VISITATION - #'s, length of stay: Attracts approximately 240 golfers; two day golf tournament held annually.

2. MARKET - origin, segments: 90 percent from outside the region; come from all over North America.

3. HOW LONG IN OPERATION:

4. CURRENT PLANS - changes, marketing initiatives: Run it in conjunction with Indian Days and Rodeo

5. YEAR ROUND/SEASONAL/EVENT: Event

6. PLANS, BROCHURES, DESCRIPTIONS: No

7. OTHER OBSERVATIONS: One of the largest Indian Golf tournaments in North America. Has gained popularity with the years.

TOURIST ATTRACTION: Redwood Meadows Golf and Country Club
A semi-private golf course located in Redwood Meadows near Bragg Creek.

1. **VISITATION - #'s, length of stay:** 36 000 rounds of golf in 1989

2. **MARKET - origin, segments:** 500 initiated members - full to capacity since 1988. No longer accepting new members. The majority are from Calgary.

3. **HOW LONG IN OPERATION:** Approximately 15 years

4. **CURRENT PLANS - changes, marketing initiatives:** None

5. **YEAR ROUND/SEASONAL/EVENT:** Seasonal

6. **PLANS, BROCHURES, DESCRIPTIONS:**

7. **OTHER OBSERVATIONS:** The course attracts a few golfers from outside the area and the province, but the numbers are minute. The club is a "semi-private club that plays like a private club". Members' golf is the main market.

   There is room for more residential developments around the back nine holes.

TOURIST ATTRACTION: Sarcee Indian Days & Rodeo
An annual event held in Morley.

1. **VISITATION - #'s, length of stay:** 9,000 - 10,000 over four days

2. **MARKET - origin, segments:** 90 percent from outside the region (U.S.A., Sask., B.C.)

3. **HOW LONG IN OPERATION:**

4. **CURRENT PLANS - changes, marketing initiatives:** Advertise through Indian Associations and The Indian Rodeo Association.

5. **YEAR ROUND/SEASONAL/EVENT:** Event

6. **PLANS, BROCHURES, DESCRIPTIONS:** No

7. **OTHER OBSERVATIONS:** Other groups are suggesting that the rodeo is declining as of late as a result of organizational problems among the five tribes of Treaty 7.

TOURIST ATTRACTION: Spruce Meadows Stables

An equestrian centre hosting both national and international events; located near Priddis, south of Calgary.

1. **VISITATION - #'S, length of stay**: 1988 - 260,000 (212,000 through tournaments).
2. **MARKET - origin, segments**: 1988 Masters Tournament Survey: 50 percent Calgary; 29 percent Alberta; 10 percent Canada; 7 percent U.S.A.; 3 percent International.
3. **HOW LONG IN OPERATION**: 13 years
4. **CURRENT PLANS - changes, marketing initiatives**: Attempting to enhance awareness to increase visitations through tours; marketed Europe in 1989; market in Japan, 1990.
5. **YEAR ROUND/SEASONAL/EVENT**:
6. **PLANS, BROCHURES, DESCRIPTIONS**: Several brochures (have translated to German and Japan, but may discontinue translation for 1990.
7. **OTHER OBSERVATIONS**: Seeing greater popularity with the years. At present most people are hearing about Spruce Meadows via the television.

   Major concern is they are having trouble putting programs in place and maintaining them (ie. self-guided tours, direct mailing lists).

   1989 guest book lists visitors from all provinces and territories of Canada except Newfoundland; 41 of 50 states; approximately 20 international countries. (Place of origin re: guest book) 59 percent Canada; 19 percent U.S.A.; 22 percent international.

TOURIST ATTRACTION: Turner Valley Discovery Days

May 14, 1989 marks the 75th anniversary of discovery of oil - started a celebration around the event.

1. **VISITATION - #'S, length of stay**: 2,000 over a three day event.
2. **MARKET - origin, segments**: 70 percent from immediate region; 30 percent from outside.
3. **HOW LONG IN OPERATION**: First year
4. **CURRENT PLANS - changes, marketing initiatives**: Plan to involve more advertising next year - this year it was organized in two weeks as the initial organizer withdrew; Calgary media.
5. **YEAR ROUND/SEASONAL/EVENT**: Event
6. **PLANS, BROCHURES, DESCRIPTIONS**:
7. **OTHER OBSERVATIONS**: Would like to host in conjunction with Black Diamond's parade and events day.

TOURIST ATTRACTION: Turner Valley Golf Course

Private club owned by the members.

1. **VISITATION - #'S, length of stay**: Approximately 37,500 rounds per year; play has been increasing at 7 - 10 percent per annum for five years.
2. **MARKET - origin, segments**: 550 members with 60 percent from Calgary
3. **HOW LONG IN OPERATION**: Nine holes since 1940's, 18 holes for 12 years.
4. **CURRENT PLANS - changes, marketing initiatives**: Word of mouth marketing; yellow pages - no plans to increase initiatives; no changes for the future.
5. **YEAR ROUND/SEASONAL/EVENT**: Seasonal
6. **PLANS, BROCHURES, DESCRIPTIONS**: See no need to change direction as club is operating near capacity.
7. **OTHER OBSERVATIONS**: Operate seven local tournaments and three to four tournaments per week for Calgary clients.

   Do not feel they will be impacted significantly by nine new golf courses coming on stream in the area.

   Very few people golf around in tours as limited accommodation is available and most golfers commute from Calgary.

ZONE C

The Area Between Calgary and Nanton, Adjacent to Highway #2 South

TOURIST ATTRACTION: High River Bronze Boot Art Gallery
Bronze Gallery showing works from the foundry in Montana (approximately 5,000 square feet).

1. **VISITATION - #'S, length of stay:** 5,000 - 6,000 visitors per year

2. **MARKET - origin, segments:** Had an international aspect to clientele; no accurate figures on place of origin.

3. **HOW LONG IN OPERATION:** 12 years

4. **CURRENT PLANS - changes, marketing initiatives:** Put the gallery up for sale and be relocated in Calgary.

5. **YEAR ROUND/SEASONAL/EVENT:** Year round

6. **PLANS, BROCHURES, DESCRIPTIONS:**

7. **OTHER OBSERVATIONS:** Hoping to sell the gallery but no buyers.

   Not anxious to provide information on the art gallery.

   The art gallery in High River has been up for sale since May 1989 because the new processing plant has decreased the owners quality of life. He has since relocated in a smaller building in Calgary.

TOURIST ATTRACTION: High River "Arts Alive"
An annual event held in November in the town of High River attracting exhibitors and buyers from southern Alberta.

1. **VISITATION - #'s, length of stay:** 65 exhibitors; 2,000+ attendees

2. **MARKET - origin, segments:** 60 percent from region; 40 percent from Calgary, Pincher Creek and eastern towns.

3. **HOW LONG IN OPERATION:** 17 years

4. **CURRENT PLANS - changes, marketing initiatives:** Continue to utilize most forms of free advertising
    1) local newspapers
    2) public service announcements in Calgary
    3) invitations through exhibitors

5. **YEAR ROUND/SEASONAL/EVENT:** Event

6. **PLANS, BROCHURES, DESCRIPTIONS:** No

7. **OTHER OBSERVATIONS:** Since the Culture department has assumed responsibility for organization, the event has grown substantially.

   Second year under department's responsibility.

   Heavy appeal because of Christmas shoppers.

TOURIST ATTRACTION: High River Country Fair & Horse Show

1. **VISITATION - #'s, length of stay:** 1,500 - 2,000 people

2. **MARKET - origin, segments:** 75 percent from region; 25 percent from beyond region - most from Calgary; come from a 300 mile radius.

3. **HOW LONG IN OPERATION:** 7 - 8 years

4. **CURRENT PLANS - changes, marketing initiatives:** Advertising in Calgary.

5. **YEAR ROUND/SEASONAL/EVENT:** Event

6. **PLANS, BROCHURES, DESCRIPTIONS:** No

7. **OTHER OBSERVATIONS:** The event is growing every year and currently there is a push to attract more prople from Calgary.

TOURIST ATTRACTION: High River "Little Beaches"
Summer Beach Party held on High River's main street.

1. **VISITATION - #'s, length of stay:** 1,200 - 1,300 participants for the one day event.

2. **MARKET - origin, segments:** 50 percent local; 50 percent outside of region; the large majority are families.

3. **HOW LONG IN OPERATION:** Three years

4. **CURRENT PLANS - changes, marketing initiatives:** Continue with same format and increase the advertising efforts; should attract more Calgary families.

5. **YEAR ROUND/SEASONAL/EVENT:** Event

6. **PLANS, BROCHURES, DESCRIPTIONS:** No

7. **OTHER OBSERVATIONS:** Held in conjunction with Antique Auto Parade which draws 120 cars from all over North America (part of the "Antique Auto Cruise" and thus gains international advertising.

   Event has been gaining popularity every year. Organizers expect the trend to continue.

TOURIST ATTRACTION: High River Little Britches Rodeo

A rodeo held in May of each year for participants 16 years of age or younger.

1. VISITATION - #'s, length of stay: 225 - 300 contestants; 6,000 - 10,000 spectators over a two day event
2. MARKET - origin, segments: 20 percent from High River area; 80 percent from outside the region.
3. HOW LONG IN OPERATION: 30 years
4. CURRENT PLANS - changes, marketing initiatives: Expanded to a two day event to accommodate the entrants; moved the parade to Saturday for merchants benefit.
5. YEAR ROUND/SEASONAL/EVENT: Event
6. PLANS, BROCHURES, DESCRIPTIONS: No
7. OTHER OBSERVATIONS: Attracts contestants from the three Western provinces and the northwestern U.S.A.

   While the event is dependent upon weather, its popularity has increased with the years.

   Advertise through local and Calgary media.

TOURIST ATTRACTION: High River North American Chuckwagon Races & Rodeo

1. VISITATION - #'s, length of stay: Three day event drawing approximately 12,000 people per year.
2. MARKET - origin, segments: 70 percent of the participants/spectators are from outside the region.
3. HOW LONG IN OPERATION: Two years
4. CURRENT PLANS - changes, marketing initiatives: Changed date to June and have attracted more wagons.
5. YEAR ROUND/SEASONAL/EVENT: Event
6. PLANS, BROCHURES, DESCRIPTIONS: Marketed through the C.P.R.A.; local/regional media; corporate sponsors
7. OTHER OBSERVATIONS: Gaining popularity with the years.

   The pre-Stampede date has resulted in greater numbers because it precedes local holiday months and increases the number of participants (practising for Stampede).

TOURIST ATTRACTION: High River Pow-Wow & Rodeo
Five day rodeo and three day dance competition and Pow-Wow

1. **VISITATION - #'s, length of stay:** 7,000 - 10,000 people over five days

2. **MARKET - origin, segments:** 80 percent of the participants are from outside the region.

3. **HOW LONG IN OPERATION:** One year

4. **CURRENT PLANS - changes, marketing initiatives:**

5. **YEAR ROUND/SEASONAL/EVENT:** Event

6. **PLANS, BROCHURES, DESCRIPTIONS:** No

7. **OTHER OBSERVATIONS:** Hoping to host the event next year but negotiations are proceeding.

   Tremendous amount of advertising (primarily in Calgary).

   $350,000.00 budget.

   Brought in several native R.C.M.P. officers.

   Anxious to host event next year.

   This year the event was originally slated for Stampede Park then Trout Lake before agreeing to High River.

TOURIST ATTRACTION: High River Santa Claus Parade
A winter parade held in High River attracting people from the region.

1. **VISITATION - #'s, length of stay:** 300 participants and approximately 3,000 spectators.

2. **MARKET - origin, segments:** Entire region with 80 percent of the spectators from the immediate area.

3. **HOW LONG IN OPERATION:** Five + years.

4. **CURRENT PLANS - changes, marketing initiatives:** No

5. **YEAR ROUND/SEASONAL/EVENT:** Event

6. **PLANS, BROCHURES, DESCRIPTIONS:** No

7. **OTHER OBSERVATIONS:** Increasing in popularity.

TOURIST ATTRACTION: Museum at the Highwood
A museum devoted to the area's natural history and located in High River.

1. **VISITATION - #'s, length of stay**: 5,000 visitors per year (an additional 20 percent don't register); stay limited to approximately two hours.

2. **MARKET** - origin, segments: One-third from immediate area; one-third from Alberta (primarily Calgary); one-third from outside province

3. **HOW LONG IN OPERATION**: 28 years

4. **CURRENT PLANS** - changes, marketing initiatives: Introducing an emphasis on railroad; two cars restored including caboose and dining car; expect major increase in visitations as a result (approximately 30,000 visits per year).

5. **YEAR ROUND/SEASONAL/EVENT**: Seasonal

6. **PLANS, BROCHURES, DESCRIPTIONS**: No specific brochures; advertise in the "Museums of Canada" and travel magazines in Europe.

7. **OTHER OBSERVATIONS**: Currently the museum is visited by
    1) museum collectors
    2) families
    3) groups - youths; seniors

    With the train component, the Chamber of Commerce is confident the potential visitors would range approximately 30,000 - 35,000 per year by concentrating on the railroad enthusiasts.

TOURIST ATTRACTION: Nanton Chinook Singers and Players
Hold an annual performance drawing people from considerable distances.

1. **VISITATION - #'s, length of stay**: 1,000 spectators over a five night performance.

2. **MARKET** - origin, segments: 75 percent of the audience are from the local area.

3. **HOW LONG IN OPERATION**: 5 + years

4. **CURRENT PLANS** - changes, marketing initiatives: local advertising

5. **YEAR ROUND/SEASONAL/EVENT**: Event

6. **PLANS, BROCHURES, DESCRIPTIONS**:

7. **OTHER OBSERVATIONS**:

TOURIST ATTRACTION: Nanton Golf Club

Located adjacent to the town of Nanton and bordering on the campground.

1. **VISITATION - #'S, length of stay:** 380 members (100 + from Calgary) - membership increased by 20 percent since 1988; 30,000 rounds per year.
2. **MARKET - origin, segments:** 125 tournaments (3,000 rounds) with more than 100 tournaments from Calgary companies; also attracts walk ons as a result of the campground (1,000 - 2,000 walk ons).
3. **HOW LONG IN OPERATION:** Nine holes for 60 + years; 18 holes for six years.
4. **CURRENT PLANS - changes, marketing initiatives:** Advertising in Calgary was successful as the club sold 44 new memberships this year; word of mouth main advertising.
5. **YEAR ROUND/SEASONAL/EVENT:** Seasonal
6. **PLANS, BROCHURES, DESCRIPTIONS:**
7. **OTHER OBSERVATIONS:** Campground is very important to the club as it attracts the passing through traffic and allows Calgary members to camp over weekends.

   Looking at the female market as the next major golfing market.

   Sold 50 new memberships in 1989, best previous increase was seven.

   Memberships increased by 20 percent; green fees increased by approximately 13 percent.

TOURIST ATTRACTION: Nanton Round-Up Days

An annual event held in Nanton during August; involves a three day event including: BBQ, Beer Gardens, Pancake Breakfast and Parade.

1. **VISITATION - #'S, length of stay:** 2,000 participants; three day event.
2. **MARKET - origin, segments:** 1,500 participants from local area; 500 from outside the region (mostly Calgary); families are the bulk of the participants.
3. **HOW LONG IN OPERATION:** 15 + years
4. **CURRENT PLANS - changes, marketing initiatives:** Advertise through a local town brochure; through local media.
5. **YEAR ROUND/SEASONAL/EVENT:** Event
6. **PLANS, BROCHURES, DESCRIPTIONS:**
7. **OTHER OBSERVATIONS:** Includes a Saturday night rodeo.

TOURIST ATTRACTION: Nanton Lancaster Bomber and Air Museum
Located in Nanton beside the southbound tourist information centre.

1. **VISITATION - #'S, length of stay**: 20,000 visitors in 1989; an increase of 45 percent over 1988.
2. **MARKET** - origin, segments: Place of origin has been listed in guest book but has yet to be analyzed; visitors come on tours and as a stopover.
3. **HOW LONG IN OPERATION**: 19 years
4. **CURRENT PLANS** - changes, marketing initiatives: Interested in housing the plane indoors to minimize damage from the elements.
5. **YEAR ROUND/SEASONAL/EVENT**: Seasonal
6. **PLANS, BROCHURES, DESCRIPTIONS**: Have brochure on the Air Museum & Lancaster Bomber distributed through Alberta Tourism.
7. **OTHER OBSERVATIONS**: Plans to develop the air Museum into a major attraction by focussing on the "British Commonwealth Training Program" (long term plan).

   Currently seeking grant monies to obtain building to house the Bomber - plans have been scaled down since running into difficulty obtaining funding for large scale museum.

   Have shop for rebuilding aircraft.

   Have all the parts to complete an Ansen aircraft.

   Hire six students during the summer months.

TOURIST ATTRACTION: Okotoks Antique Car Auction
Held indoors at the arena in Okotoks.

1. **VISITATION - #'s, length of stay**: 5,000 - 6,000 participants; 200 cars consigned.

2. **MARKET - origin, segments**: One-third from outside Alberta (Western Canada, Europe and U.S.A.); Two-thirds from Alberta (approximately 60 percent from Edmonton and Calgary).

3. **HOW LONG IN OPERATION**: 17 years

4. **CURRENT PLANS - changes, marketing initiatives**: Advertise through local and regional papers; international auto magazines (ie. Hemming Motor News); word of mouth major marketing tool.

5. **YEAR ROUND/SEASONAL/EVENT**: Event

6. **PLANS, BROCHURES, DESCRIPTIONS**: Yes, a brochure put out every year and widely distributed.

7. **OTHER OBSERVATIONS**: Does have an international slant to the auction. Have sold cars to England and Germany. Have developed a solid repuration through the years of business.

   Held one week before the High River Antique Parade so as not to compete.

   Major growth occurred four years ago when the auction moved into a new arena complex.